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FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

FT 1-53

February 10, 1953

BELGIUM TOBACCO MANUFACTURING, CONSUMPTION, IMPORTS AND EXPORTS VARY

Belgium's manufacture of cigarettes during January-June 1952 totaled 4,253 million pieces, or 9 percent lower than the 4,657 million pieces manufactured during the same 1951 period. Cigarette consumption also decreased over 15 percent during the first 6 months of 1952 as compared with the same 1951 period. Imports of cigarettes also declined 41 percent and exports were down 33 percent during the first 6 months of 1952 as compared to the corresponding 1951 period.

BELGIUM: Cigarette manufacture, imports, consumption
Exports January-June 1951 and 1952 1/

Period	Manufacture:	Imports :	Total :	Consumption:	Exports :	Total
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds
January-June 1951	1,094,583	194,000	1,288,583	1,000,630	129,278	1,129,908
January-June 1952	999,000	129,000	1,128,000	924,725	86,001	1,010,726

Cigar manufacturing declined 6 percent during January-June 1952 below the comparable 1951 period. However, cigar consumption increased 15 percent during the 1952 period. It is evident that the increase in cigar consumption is not due to an extension in Belgium's output, but to increased imports, mainly from the Netherlands. However, measures have been taken to protect the cigar industry against the Dutch flooding the market with low-priced products. Imports of cigars were 71 percent higher in the first semester of 1952; however, exports were 50 percent below the comparable 1951 period.

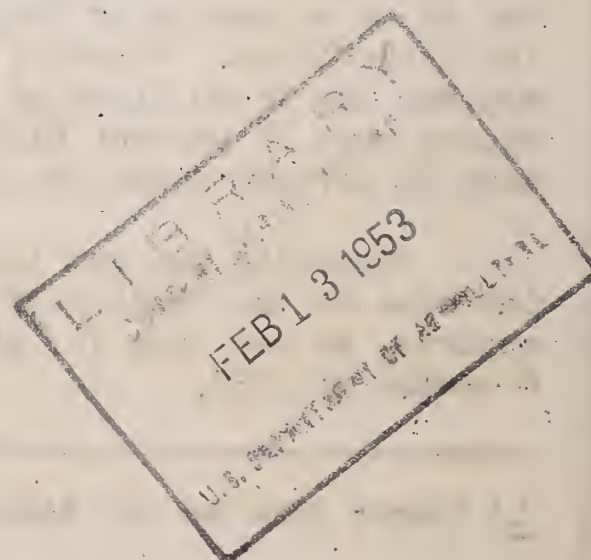
Cigarillo and cut tobacco manufacture, consumption, and imports showed an increase in the first half of 1952 as compared with the 1951 period. However, exports, as was true for all tobacco products, declined appreciably in the first 6 months of 1952.

1/ Source same as for table at end of circular.

BELGIUM: Manufacture, imports, consumption and exports of other tobacco products January-June 1951 and 1952

Product and Period	Manufacture	Imports	Total	Consumption	Exports	Total
	1,000 <u>pieces</u>	1,000 <u>pieces</u>	1,000 <u>pieces</u>	1,000 <u>pieces</u>	1,000 <u>pieces</u>	1,000 <u>pieces</u>
<u>Cigars</u>						
January-June 1951	34,100	5,900	346,900	34,000	2,800	36,800
January-June 1952	32,100	10,100	42,200	39,000	1,400	40,400
<u>Cigarillos</u>						
January-June 1951	134,700	8,200	142,900	134,422	10,000	144,422
January-June 1952	152,700	8,400	161,100	173,000	6,400	179,400
	1,000 <u>pounds</u>	1,000 <u>pounds</u>	1,000 <u>pounds</u>	1,000 <u>pounds</u>	1,000 <u>pounds</u>	1,000 <u>pounds</u>
<u>Cut Tobacco</u>						
January-June 1951	11,920	94	12,014	10,648	1,210	11,858
January-June 1952	12,094	125	12,219	11,625	515	12,140

Office of Foreign Agricultural Relations. Compiled from Tobacco Courrier, Vol. 6, No. 2, October 1952, Brussels.





FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

FT 2-1953

March 5, 1953

CANADA'S TOBACCO EXPORTS HIGHER

Canada's exports of unmanufactured tobacco during the calendar year 1952 were 31 percent above 1951 and 70 percent above 1950, according to official export statistics released by the Canadian Government.

The country's leaf exports during 1952 totaled 38.3 million pounds valued at \$22.2 million Canadian dollars as compared with 29.2 million pounds valued at \$16.4 million in 1951. Exports of leaf during 1950 totaled 22.5 million pounds valued at \$10.6 million. Flue-cured exports comprised 37.3 million pounds, or 97 percent of the total leaf exported during 1952. The remaining exports during 1952 consisted of 820,000 pounds of Burley, 143,000 pounds of dark leaf, and 66,000 pounds of other type leaf.

The United Kingdom, the most important outlet, took 31.1 million pounds, or 81 percent of total exports. Flue-cured leaf accounted for 31.0 million pounds, or over 99 percent of all exports to the United Kingdom. Other countries to which Canada exported leaf tobacco in 1952 included Australia, which took 2.8 million pounds; Trinidad, 1.4 million pounds; and Jamaica, 1.2 million pounds.

CANADA: Exports of leaf tobacco by types, 1951 with comparisons

Type of leaf	1952	1951	1950
	1,000 pounds	1,000 pounds	1,000 pounds
Flue-cured	37,286	28,310	19,670
Burley	820	597	893
Dark	143	201	185
Other	66	72	1,621
Total	38,315	29,180	22,508

1/ Does not include 234,900 pounds of stems and cuttings.

Compiled in the Office of Foreign Agricultural Relations from Dominion Bureau of Statistics.

Canada exported 88.6 million cigarettes valued at \$361,377 Canadian dollars during 1952 as compared with 36.3 million valued at \$180,380 during 1951. Canadian cigarette exports during 1950 totaled 9.1 million pieces valued at \$39,398. Western Germany, the most important 1952 cigarette outlet, took 58.0 million pieces, or 65 percent of the total; the United Kingdom, the second most important outlet, took 12.9 million pieces, or 15 percent. The remaining 20 percent was exported to numerous countries including Japan, India, Pakistan, Syria, Mexico, the United States, and Venezuela. The exchange rate of the Canadian dollar is \$1.00 for \$1.0178 U. S. dollars.





FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
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FT 3-53

March 9, 1953

UNITED KINGDOM LEAF TOBACCO IMPORTS AND EXPORTS OF TOBACCO PRODUCTS DECREASE

The total consumption of tobacco in the United Kingdom in the postwar years is slightly greater than the prewar average; however, the percentage of the total being supplied by the United States shows a steady trend downward.

UNITED KINGDOM: Consumption of tobacco, with comparisons

Year	Total Using <u>1</u> / ₂	Percentage of U. S. Tobacco
	Million pounds	Percent
Average 1935-39	255	77
1947-51	276	66
Annual 1951	289	54
1952	282	52

1/₂ Approximate.

Compiled in the Office of Foreign Agricultural Relations from Trade and other sources.

Imports of unmanufactured tobacco, stripped and unstripped, during 1952 were 37 percent below 1951, according to the statistics released in Trade and Navigation of the United Kingdom, December 1952. Exports of manufactured tobacco products (excluding snuff) during the 1952 calendar year were 8 percent below 1951.

Imports of unmanufactured tobacco during 1952 were only 223.7 million pounds as compared with 354.9 million pounds in 1951 and 305.8 million in 1950. The 1952 imports consisted of 179.2 million pounds of unstripped and 44.5 million pounds of stripped leaf. Decreased takings by the United Kingdom in 1952 do not reflect consumption trends during this period, since the United Kingdom has been using from stocks built in 1951. Estimated consumption during 1952 was 1-1/2 percent below 1951. Even though the dollar situation improved in 1952, tobacco purchases were restricted.

UNITED KINGDOM: Imports of unmanufactured tobacco 1952 with comparisons

(Dry Weight)

Type	United States	Southern Rhodesia	India	Nyasaland	British	Other	Canada	Netherlands	Greece	Turkey	Other	Total
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Total Stripped & Unstripped												
1952 ^{1/}	66,840	58,445	38,297	11,826	2,434		32,439	9,088	1,170	570	2,634	223,743
1951	212,005	50,403	40,120	16,107	3,121		21,639	3,799	1,273	3,155	3,259	354,878
1950	143,440	61,075	48,140	17,400	4,015		15,716	1,797	1,039	10,768	2,104	305,805
Unstripped												
1952 ^{1/}	65,153	48,599	9,775	8,045	1,725		32,439	9,088	1,170	570	2,630	179,194
1951	210,904	40,722	8,151	10,950	2,802		21,636	3,799	1,273	3,155	3,254	306,646
1950	142,364	53,409	7,549	10,896	3,319		15,767	1,797	1,039	10,768	1,986	249,164
Stripped												
1952 ^{1/}	1,687	9,846	28,522	3,781	709		-	-	-	-	4	44,549
1951	1,101	9,681	31,969	5,157	319		-	-	-	-	5	48,232
1950	1,076	7,666	40,591	6,504	696		-	-	-	-	118	56,641

^{1/} Preliminary.

Compiled from Trade and Navigation of the United Kingdom, December 1952

While the United States continued as the most important source of unmanufactured tobacco in 1952, only 66.8 million pounds of United States tobacco were imported, or less than a third as much as the 212.0 million pounds in 1951 and less than one-half of the 143.7 million pounds in 1950. However, imports from Commonwealth countries increased to 143.4 million pounds during 1952 as compared with 131.4 million in 1951. This change to non-dollar sources for leaf tobacco could be indicative of the United Kingdom's future plan for leaf purchasing provided these countries are able to produce the volume of quality leaf required by consumer preference.

Southern Rhodesia, the second most important 1952 source of leaf, supplied 58.4 million pounds as compared with 50.4 million pounds in 1951. India ranked third, with 38.3 million pounds in 1952, and Canada, fourth, with 32.4 million pounds.

Flue-cured leaf imports during 1952 accounted for 191.9 million pounds, or 86 percent of total leaf imports. Commonwealth countries supplied 127.4 million pounds of flue-cured leaf in 1952 as compared with 110.6 million in 1951, while all other foreign countries supplied only 64.5 million in 1952 compared with 210.6 million in 1951.

The total exports of tobacco products were approximately 8 percent below the exports in 1951; however, they were approximately 9 percent above the 1950 exports.

UNITED KINGDOM: Exports of manufactured tobacco products to specified countries in 1952 with comparisons 1/

Country of Destination	1952	1951	1950
	1,000	1,000	1,000
	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>
British Malaya	18,193	19,130	15,704
Australia	4,215	8,781	6,469
Hong Kong	1,624	2,047	1,801
Aden	1,008	896	1,149
British West Africa	2,298	2,656	2,807
British East Africa	377	452	276
Other British Countries	5,538	5,121	4,627
Germany	2,905	2,320	2,230
Belgian Congo	2,781	3,023	2,381
Egypt	1,546	1,206	1,208
Denmark	220	250	372
Other Foreign Countries	6,769	5,489	4,462
Total	47,474	51,371	43,486

1/ Excluding snuff.

Compiled in the Office of Foreign Agricultural Relations from Trade and Navigation of the United Kingdom, December 1952.

Exports of manufactured tobacco products (excluding snuff) from the United Kingdom in 1952 totaled 47.5 million pounds as compared with 51.4 million pounds in 1951. Manufactured tobacco exports during 1950 totaled only 43.5 million pounds. Cigarette exports accounted for 45.1 million pounds, or 95 percent of the total 1952 manufactured tobacco exports. The 1951 cigarette exports totaled 48.8 million pounds, or 95 percent of the total manufactured tobacco exports, while the 1950 exports were 41.0 million pounds, or 94 percent of the total.

The stocks of tobaccos in the United Kingdom on December 31, 1952, were as follows:

<u>Kinds of tobacco</u>	<u>Approximate number of months of stocks at current rate of using</u>
U. S. Flue-cured	15
U. S. Dark	18
Empire Flue-cured	22
Empire Dark	26

Compiled in the Office of Foreign Agricultural Relations from Trade and other sources.



FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
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FOREIGN MARKET NOTES--TOBACCO

Tobacco Situation in Turkey 1/

By George W. Van Dyne
Marketing Specialist

Turkey is the world's largest producer and exporter of oriental-type tobacco. It is also one of the seven largest tobacco growing countries. Practically all phases of its tobacco industry are controlled by the State Monopoly. The Monopoly maintains very helpful modern research institutes at Maltepe and in each of the important tobacco production areas; buys leaf tobacco for domestic manufacture and for export--a practice that is tantamount to a price support program; and successfully operates tobacco manufacturing factories at Istanbul, Izmir, Samsun, and other large tobacco centers.

Tobacco is very important to the economy of Turkey. There are about 230,000 tobacco growers, about 61,000 people employed in manipulation plants, and over 5,000 in the tobacco factories. During postwar years the value of leaf exports has been about 30 percent of the country's total exports. In 1951 the Monopoly's revenue from tobacco amounted to about \$54,458,500, compared with a prewar (1935-39) average of about \$11,995,200.

Leaf Tobacco Production

Turkey's production of leaf tobacco since the war has been well above the prewar average of 128.5 million pounds, and an all-time record was established in 1947 when 224.8 million pounds were harvested. Production

1/ Part of a continuing study of foreign market outlets and competition with United States tobacco being conducted by Mr. Van Dyne, with headquarters in Paris, France, and authority to travel in Europe, Asia, and Africa, under the provisions of the Agricultural Marketing Act. Mr. Van Dyne acknowledges the help given him by the tobacco trade, State Tobacco Monopoly, officials of the Turkish Government, and members of the staff of the United States Embassy at Ankara.

totalled 199 million pounds in 1951 and is estimated at 201.4 million pounds in 1952. The 1952 crop was produced from about 364,000 acres by approximately 230,000 growers.

The quality of the 1952 crop, according to opinion of a cross-section of the trade, is superior to the previous season's. It is believed to be made up of about 60 to 65 percent A grades, 15 to 20 percent B grades, 8 to 10 percent Kappa, some scraps, and a small proportion of usable Double Kappa. Prices to growers are expected to exceed the average for the previous crop, which was equivalent to 31.75 cents per pound. Prices for medium and better grades in particular are expected to be higher because the quality is up, stocks are down, and prospects for exports are bright.

Practically all tobacco grown in Turkey is sun-cured Nicotiana tabacum used principally for cigarettes. About half a million pounds of this species is bright Virginia type. 2/ A little Wisconsin cigar-type tobacco is also grown, and small quantities of Nicotiana rustica are produced chiefly for smoking in nargiles, or hookahs.

The most important growing areas are located in the Aegean, Black Sea, Marmara, and Southeast zones. These areas produce about 51, 25, 21, and 3 percent respectively of Turkey's tobacco crops. The principal growing district is Izmir. Here as elsewhere in Turkey the land is plowed with horses or oxen and tilled with primitive spiked harrows. There is no irrigation and only very limited quantities of manure are used; reliance is placed upon the soil and climate.

In Turkey, tobacco is sown in seedbeds in February and March, transplanted in April and May, and harvested from July to September. In harvesting, the leaves are primed three to five at a time as they ripen. The plants are not topped, and flower heads break out when about half the leaves have been pulled. In curing, the leaves are strung, hung in the shade for 24 hours to wilt, then secured to racks and sun-cured for 7 to 10 days. After curing, the tobacco is bulked on sticks indoors, or hung by strings under roofs or porches until brought in order by the autumn rains. Then the leaf is ready to be handled.

There are no auction sales as in the United States. All buying is done by individual bargaining. The opening dates for sales are fixed by the State Monopoly. Izmir is first to open, and sales there generally start in January and end within a few weeks. Sales then commence in Samsun, and later at Trabzon, Bursa, Malatya, and smaller markets. From the farms the tobacco is shipped in bales to manipulation depots, which are the equivalent of our re-drying plants. Here the leaves are sorted, graded, and packed in bales averaging about 132 pounds for storage while awaiting shipment. The main manipulation centers are at Izmir, Istanbul, Trabzon, and Bursa. Export shipments are made principally in the winter months starting in September. The chief ports are Izmir and Istanbul, but important quantities are also shipped from Samsun and Iskenderun.

2/ Source: Tobacco trade and Central Statistical Board.

Exports

Turkey's leaf tobacco exports increased from a prewar (1935-39) average of 75 million pounds to 112 million pounds in 1950 and 127 million in 1951. These gains were brought about principally by a substantial increase in the number of smokers and the almost world-wide shift in consumer preference from strong, dark cigarettes to United States blended-type cigarettes, which contain some Turkish tobacco. The all-time record was established in 1949 when Turkey exported 171 million pounds of leaf tobacco, about 44 million pounds going to Western Europe upon the reopening of that market.

During postwar years the United States has been the principal buyer of Turkish tobacco. In 1951 the United States took 69.7 million pounds, which was about 55 percent of Turkey's total leaf exports. Western Germany was the second largest outlet in 1951 when it imported 10.3 million pounds. Egypt was third with 8.0 million pounds, followed by France with 6.7 million pounds, Yugoslavia with 4.5 million pounds, the U.S.S.R. and Austria with over 3.3 million pounds each, and the United Kingdom, Czechoslovakia, and Finland with over 2.2 million pounds each. Smaller but important shipments were made to Italy, Switzerland, Sweden, the Netherlands, and other European countries attempting to manufacture United States blended-type cigarettes.

Exports in 1952 are believed to have been somewhat larger than in 1951. The market in East Germany reopened; Western Germany bought heavily, as did the U.S.S.R.; and orders from the United States were expected to be larger than usual.

The outlook for exports of leaf tobacco is believed to be very good by the State Monopoly and exporters who have successfully expanded this trade during the postwar period. The State Monopoly has very helpful trade and compensation arrangements with about half of the 24 countries to which it ships tobacco, it plans to restrict the districts in which tobacco may be grown and the types of seed used in an attempt to further improve the quality of its tobacco, and it has a very substantial sum available from taxes collected from tobacco farmers since 1945 to provide for possible losses on its export sales of surplus leaf.

Prices paid by United States buyers for tobacco from the 1951 crop ranged from 54.4 to 59.0 cents per pound f.o.b. Izmir; Western European buyers paid 20.4 to 57.6 cents per pound, and the United Kingdom paid an average of 57.2 cents per pound. Soviet buyers paid from 39.0 to 57.6 cents per pound for tobacco from the 1949 and 1950 crops.

Turkey's exports of tobacco products during recent years averaged only about 600,000 pounds and were comprised chiefly of scrap tobacco and cigarettes. The scrap tobacco was shipped mainly to Yugoslavia and Germany, and the cigarettes chiefly to Iraq, Saudi Arabia, and Syria.

Stocks of Leaf Tobacco

Stocks of leaf tobacco declined from about 209.4 million pounds on November 27, 1951, to not more than 192.7 million pounds on the same date in 1952. Growers have no stocks of 1951 or older tobacco. Of the total stocks of 1951 and older leaf on November 27, 1952, merchants held 18.5 million pounds, all of which was earmarked for export. The remaining stocks are held by the Monopoly for export and for utilization in its domestic factories.

Domestic Manufacture

The manufacture of tobacco products in Turkey is in the hands of the Tobacco Monopoly which operates large plants at Istanbul and Izmir, and smaller but important plants at Samsun, Malatya, Adana, and Bitlis. The industry is well mechanized and efficiently operated. Cigarettes are the leading manufactured product, but smoking tobacco and small quantities of cigars and snuff are also produced.

The net weight of tobacco used for domestic manufacture in 1951 is reported at 43.7 million pounds by the Monopoly, compared with 38.6 million pounds in 1950 and a prewar (1935-39) annual average of 28.6 million pounds. Final figures for 1952 are not available but are expected to show an increase of about 7 percent over 1951.

Cigarette production has been increasing since the war at the expense of other tobacco products. In 1951 cigarettes represented 85 percent of total output, compared with an average of 75 percent during 1935-39. In 1951 the output of cigarettes totaled 37.9 million pounds; smoking tobaccos, 5.6 million pounds; and other products (principally Tumbeki and other pipe tobaccos) 166,667 pounds, which included only 4,409 pounds of snuff and 2,866 pounds of cigars and cigarillos.

Consumption, particularly of cigarettes is expanding because of an increase in the smoking population and in the purchasing power of consumers. The cigarettes are well made, attractively packed, and reasonably priced. Prices to consumers range from the equivalent of 7.1 to 28.6 cents per pack of 20 pieces. The higher priced class includes a brand of bright Virginia-type cigarettes, sales of which are small mainly because the tobacco is coarse and peppery. Roll-your-own cigarette tobacco in 20-gram packets is sold at the equivalent of 7.1 cents per packet with free cigarette papers.

Imports of Leaf Tobacco and Tobacco Products

Turkey's imports of leaf tobacco and tobacco products are negligible, but small quantities of United States blended-type cigarettes and English smoking tobacco can be found on the black market.



FOREIGN AGRICULTURE CIRCULAR

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FOREIGN AGRICULTURAL SERVICE
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FOREIGN MARKET NOTES--TOBACCO

The Tobacco Situation in Egypt 1/

By George W. Van Dyne
Marketing Specialist

Egypt's tobacco industry has depended on imports for its supplies of leaf tobacco since 1890 when tobacco growing was prohibited to protect the revenue derived from customs receipts on tobacco. In 1948 leaf tobacco and tobacco products accounted for 38 percent of total customs receipts. In 1952 they accounted for only 35 percent, largely as a result of a drop in imports following a sharp increase in duty in January 1951. In 1953 the percentage may be even less, if imports are further reduced by the higher duties imposed in August 1952 (see table 1). However, imports may be increased in order to build up stocks of leaf tobacco to over a year's supply before next fall. At the end of December 1952 stocks of leaf totaled only 22.9 million pounds - nearly 10 million pounds less than at the end of 1950 - and represented only 10 to 11 months requirements. Stocks of imported tobacco products, particularly cigarettes, were also extremely low (see table 2).

1/ Part of a continuing study of foreign market outlets and competition with United States tobacco being conducted by Mr. Van Dyne, with headquarters in Paris, France, and authority to travel in Europe, Asia, and Africa, under the provisions of the Agricultural Marketing Act. Mr. Van Dyne acknowledges the help given him by the tobacco trade, Egyptian Government officials, and members of the staff of the United States Embassy at Cairo.

Note: Exchange rate, £E1 equals US\$2.87156.

Table 1.--Egypt: Customs duties on leaf tobacco and tobacco products

Item	Old rate	New rate effective Aug. 7, 1952
Leaf tobacco:		
(a) Import duty	\$3.26 per lb.	\$3.91 per lb.
(b) Additional ad valorem duty	7 percent	8 percent
(c) Quay dues	\$0.0039 per lb.	\$0.0039 per lb.
(d) Municipal dues	1½ percent of (a) and (b)	1½ percent of (a) and (b)
Manufactured tobacco, except cigars:		
(a) Import duty	\$4.56 per lb.	\$5.21 per lb.
(b) Additional ad valorem duty	17 percent	18 percent
(c) Quay dues	\$0.0039 per lb.	\$0.0039 per lb.
(d) Municipal dues	1½ percent of (a) and (b)	1½ percent of (a) and (b)
Cigars:		
(a) Import duty	\$4.56 per lb.	\$5.21 per lb.
(b) Additional ad valorem duty	17 percent	38 percent
(c) Quay dues	\$0.0039 per lb.	\$0.0039 per lb.
(d) Municipal dues	1½ percent of (a) and (b)	1½ percent of (a) and (b)

Table 2.--Egypt: Stocks of leaf tobacco and American cigarettes in bonded stores, as of December 31, 1951 and 1952

Source and kind	1951	1952
	Pounds	Pounds
Leaf tobacco:		
Africa	5,132,457	4,264,871
United States	5,463,681	4,848,105
Bulgaria	207	-
China	766,683	624,477
Cyprus	48,137	39,363
Greece	4,214,803	2,735,476
Netherlands	-	265
India	2,711,953	2,647,590
Italy	221,622	261,957
Japan	6,292	139,600
Jordan	19,347	-
Lebanon	147,655	223,207
Israel	2,954	2,205
U.S.S.R.	1,101,502	1,357,260
Syria	-	705
Libya	84,663	1,984
Turkey	9,396,380	5,231,489
Yugoslavia	56,896	253,835

Continued -

Table 2.--Egypt: Stocks of leaf tobacco and American cigarettes in bonded stores, as of December 31, 1951 and 1952 (cont'd)

Source and kind	1951	1952
	<u>Pounds</u>	<u>Pounds</u>
Sundries:		
Hassan Keif	33,871	19,630
Tombac	271,285	234,541
Other	220,462	-
Total, leaf tobacco	29,899,850	22,886,560
	<u>Pieces</u>	<u>Pieces</u>
Cigarettes:		
United States	69,000,000	31,978,480

Source: Trade sources.

Clearances of Leaf Tobacco from Bond

Egypt's clearances and utilization of imported leaf tobacco in recent years have been more than double the prewar (1935-39) annual average of 12.5 million pounds. But principally because of higher taxes, there has been a steady downward trend since 1950. Clearances of leaf tobacco dropped from about 28.3 million pounds in 1950 to 28.1 million pounds in 1951 and 26.1 million pounds in 1952.

Egypt imports more types of leaf tobacco than any other country. In 1952 it took leaf from over 20 countries (see table 3). About half of the 26.1 million pounds cleared came from oriental countries producing oriental cigarette-type leaf, principally Turkey, Greece, and the U.S.S.R. Africa supplied about 4.8 million pounds, principally fire-cured leaf from the Rhodesias for cigarette making, but also important quantities of Nyasaland dark fire-cured leaf for making cut tobacco chiefly for use in nargiles (waterpipes), and small lots for chewing purposes. The third largest quantity cleared was leaf from the United States, which totaled over 4.2 million pounds and was made up of 78 percent flue-cured and 21.8 percent Burley, both for cigarettes, and 0.2 percent dark-fired leaf for chewing tobacco. The next heaviest clearances included Indian bright Virginia-type leaf and strips for cigarettes and Chinese light air-cured leaf for smoking or chewing.

In 1952 prices for leaf tobacco c.i.f. Alexandria were a little lower than in 1951 for Greek, Turkish, and Indian flue-cured leaf but were higher for most other types (see table 4). Prices in general are expected to be a little firmer in 1953.

Table 3.--Egypt: Total clearances of leaf tobacco and strips, average 1935-39, annual and average 1949-52

Country of origin	Average: 1935-39:	1949	1950	1951	1952	Average 1949-52
	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	pounds
Leaf and strip (excluding Hassan Keif and Tombac):						
Turkey	1,327:	9,092:	9,019:	8,000:	7,258:	8,342
Africa	68:	5,905:	5,909:	5,363:	4,805:	5,496
United States	1,045:	3,102:	3,894:	4,003:	4,264:	3,816
India	(50:	2,083:	2,211:	2,213:	2,182:	2,172
Pakistan	25:	1:	1/	1/		7
Bulgaria	1,817:	1,358:	217:	32:	8:	404
Greece	2,367:	2,089:	2,907:	3,939:	3,499:	3,108
China	1,368:	832:	1,059:	1,011:	944:	961
Japan	3,245:	375:	290:	51:	137:	214
Cyprus	1/	265:	313:	244:	133:	238
Palestine-Israel	1:	8:	26:	24:	-	15
U.S.S.R.	270:	231:	913:	1,347:	1,101:	898
Syria	35:	146:	247:	310:	273:	244
Libya	-	53:	2:	4:	66:	31
Jordan	-	-	-	2:	35:	9
Yugoslavia	-	21:	29:	283:	152:	121
Italy	-	5:	163:	174:	288:	158
Other countries	114:	12:	4:	2:	4:	5
Total	11,707:	25,602:	27,204:	27,002:	25,149:	26,239
Hassan Keif:						
Turkey	367:	279:	311:	301:	288:	295
Syria	11:	-	-	-	-	-
Libya	4:	-	-	-	-	-
United States	1:	-	-	-	-	-
Other countries	1:	-	-	-	-	-
Total	384:	279:	311:	301:	288:	295
Tombac:						
Aden	211:	671:	638:	617:	532:	615
Iran	75:	98:	55:	20:	11:	46
Syria	1:	66:	110:	128:	113:	104
India	-	4:	3:	-	-	2
Italy	111:	-	-	-	-	-
Other countries	7:	-	-	-	-	-
Total	405:	839:	806:	765:	656:	767
Grand total	12,496:	26,720:	28,321:	28,068:	26,093:	27,301

1/ Less than 500 pounds.

Source: Customs Bureau, Cairo.

Table 4.--Egypt: Average merchants' prices and/or direct import prices of leaf tobacco to manufacturers, 1951 and 1952

Item	1951	1952
	Cents per lb.	Cents per lb.
Greek		
Macedonian	79.45	65
Thessaly	56.0	56
Old Greece	58.6	52
Turkish		
Izmir	61.2	59
Marmara	61.2	55
Black Sea	69.0	65
Chinese		
Dong Shang	58.6	60
Kwang Fung Madga	117.2	137
Russian		
Sokhoum IV	45.5 - 49.5	49
Sochi	61.2 - 65.1	63
Rhodesian		
Flue cured, low quality	-	38
Flue cured, medium quality	61.2	-
Nyasaland		
Dark fired	27.4	36
Burley	33.9 - 35.2	-
Indian		
Flue cured	39.1	26
United States		
Flue cured, medium	58.6	62
Burley, medium	65.1	(55
Burley, low-medium	-)
Fire cured	45.6 - 58.6	48

Source: Trade sources.

Clearances of Tobacco Products

Total clearances of imported tobacco products have also declined since 1950, but are still higher than the prewar (1935-39) annual average (see table 5). This trade is made up almost entirely of straight Virginia-type cigarettes made in England and blended-type cigarettes from the United States. Since 1950 the decline has been particularly great in imports of English cigarettes, but the outlook for all trade in imported cigarettes is very unsatisfactory. This business will dwindle into a small luxury trade because the brands are being priced out of the market, mainly as a result of heavy taxation. Prices of popular brands of imported cigarettes increased from 31.6 U.S. cents per packet in 1950 to 44.5 U.S. cents for English cigarettes and 41.6 U.S. cents for American cigarettes in 1952.

Table 5.--Egypt: Clearances of imported tobacco products, average 1935-39, and annual 1950-52

Product	1935-39	1950	1951	1952
	Pounds	Pounds	Pounds	Pounds
American cigarettes	81,570	191,800	145,504	156,527
English cigarettes	180,777	432,102	271,166	180,777
Other products	55,115	30,864	35,273	33,069
Total	317,462	654,766	451,943	370,373

Source: Official sources.

Domestic Manufacture

The tobacco industry in Egypt is well mechanized and very efficiently operated by experienced manufacturers who employ about 10,000 workers. Approximately two-thirds of the factory output comes from Cairo; the other large manufacturing city is Alexandria -- Egypt's chief tobacco import, export, and storage warehouse center.

Increased taxation has been chiefly responsible for the drop in factory output from about 28 million pounds in 1950 to 26 million pounds in 1952. Tobacco products manufactured in Egypt include cigarettes (only about 1½ per cent of which are now made by hand), "roll-your-own" cigarette tobacco, pipe and chewing tobacco, and cigars. Cigarettes are the leading product, but in recent years they have lost ground to the cheaper "roll-your-own" cigarette tobacco, pipe tobacco, and small cigars. The percentage breakdown of production in 1949 and 1952 is as follows:

	<u>1949</u> Percent	<u>1952</u> Percent
Cigarettes	75.5	70.9
Roll-your-own cigarette tobacco	13.3	16.2
Pipe tobacco and small cigars	10.2	11.9
Chewing tobacco	1.0	1.0

Production of United States blended-type cigarettes has been increasing at the expense of other kinds of cigarettes. In 1952 oriental-type cigarettes represented 32.5 percent of all production, United States blended types 26.2 percent, and bright Virginia cigarettes 12.2 percent.

Domestic brands of cigarettes sell for much less than imported cigarettes.

Top prices of domestic brands of cigarettes are compared below with prices of imported cigarettes in 1952:

	Cents per box of 20
Domestic:	
Oriental-type cigarettes made of a blend containing principally Turkish, Greek, and other oriental-type leaf	28.7
United States blended type cigarettes con- taining a blend of U.S. flue-cured and Burley tobacco mixed with oriental types ..	28.7
Bright Virginia-type cigarettes containing 100 percent U.S. flue-cured leaf	31.6-34.4
Virginia-type cigarettes containing varying percentages of assorted flue-cured tobacco	22.9
Imported:	
English Virginia-type cigarettes	44.5
United States blended-type cigarettes	41.6

At this time "roll-your-own" fine-cut tobacco was selling in packets for about 5.7 cents for 4.5 grams, 7.18 cents for 5.7 grams, and 14.4 cents for 11.75 grams.

The progress made by Egypt's tobacco manufacturing industry has been retarded principally by increased taxes. Without relief in this direction, only an increase in the number of consumers and their take-home pay can stop the downward trend in production of tobacco products.

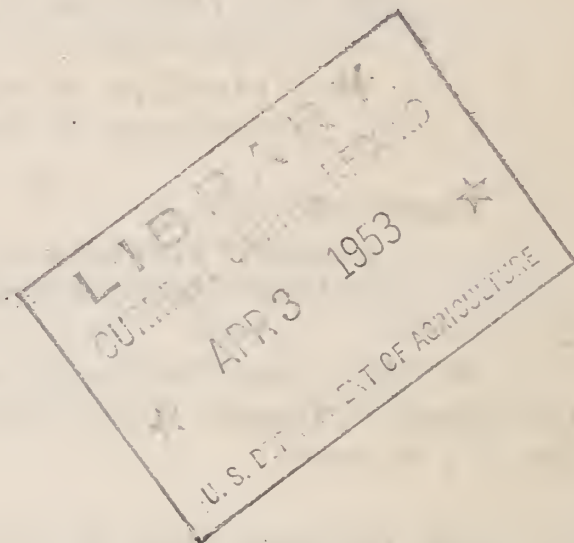
Exports of Tobacco Products

Egypt's exports of tobacco products consist of cigarettes and cut tobacco made of a blend of oriental tobaccos and used for roll-your-own cigarettes. Although exports have been increasing in recent years, they are still well below the 1935-39 annual average of 652,562 pounds. Exports of tobacco products totaled 173,233 pounds in 1950, 188,343 pounds in 1951, and are estimated by the trade at 205,638 pounds for 1952.

During the prewar period (1935-39) cigarettes made up practically all of the export trade, but during 1951 and 1952 cut tobacco has been the more important export product. Exports of cigarettes dropped from a prewar average of over 570,000 pounds to an average of just over 80,000 pounds during 1951 and 1952, while exports of cut tobacco increased from about 83,000 pounds to 108,000 pounds.

The most important export markets for cigarettes now are Italy, which takes about 35,000 pounds per year, and Saudi Arabia, which takes approximately 13,000 pounds. Ships stores, Sweden, and the Netherlands are the next most important outlets. Practically all of the cut tobacco goes to Saudi Arabia.

The export trade in cut tobacco will probably remain fairly steady. The outlook for cigarettes, however, is not good, principally because so many consumers have switched from oriental-type cigarettes to the United States blended type. Exports of cigarettes are also affected by the manufacture of somewhat similar brands in other countries and by the increased import duties on leaf tobacco which have increased the cost of manufacturing cigarettes in Egypt.





FOREIGN AGRICULTURE CIRCULAR

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April 13, 1953

EXPORTS OF UNMANUFACTURED TOBACCO LOWER IN 1952

Exports of unmanufactured tobacco during 1952 were 395.0 million pounds valued at \$245.4 million as compared with 522.1 million pounds valued at \$325.5 million in 1951. This represents a decrease of 24 percent in volume and 25 percent decrease in value. Postwar annual (1948-52) average exports totaled 463.8 million pounds valued at \$257.5 million. This corresponds to the prewar (1935-39) average of 420.8 million pounds valued at \$127.8 million. A decrease occurred in exports of every type leaf except Burley, Dark-fired Virginia, and Green River, which increased slightly. The decrease is primarily a result of unusually small takings by the United Kingdom, which took only 54.2 million pounds as compared with 223.4 million pounds.

Flue-cured Tobacco exports accounted for 318.0 million pounds valued at \$200.8 million, or 81 percent of total volume and 82 percent of total value in 1952. Exports of this type leaf in 1952 were 27 percent below 1951. Decreased shipments of flue-cured leaf in 1952 are primarily attributed to the United Kingdom's taking only 49.8 million pounds as compared with 220.6 million in 1951. This difference was partially offset by a substantial increase in exports to Western Germany, the Netherlands, the Philippine Republic, Japan, Australia, Indonesia, and France during this period. Other countries which took smaller shipments in 1952 include Sweden, Switzerland, Belgium-Luxembourg, and New Zealand.

Burley Tobacco exports during 1952 were 26.9 million pounds, or 7 percent above the 25.2 million pounds in 1951. A larger Burley export market appears to have been established in the postwar years. The unusually high postwar (1948-52) average is largely due to larger shipments to Germany in 1949 and 1950. A relatively stable or a continued increasing export market apparently has been established in Austria, Belgium, Denmark, Sweden, Egypt, and Mexico. During 1952 Germany, the largest outlet, took 43 percent more than in 1951. Sweden, the second most important outlet, took 97 percent more, Belgium, third, most important outlet, took 6 percent more. Mexico took over ten times more in 1952 than in 1951; Denmark, 23 percent more and Austria, 6 percent more in 1952.

Kentucky-Tennessee Fire-cured Tobacco exports in 1952 totaled 21.8 million pounds, or 26 percent below 29.2 million pounds in 1951 and 56 percent below the prewar average of 49.0 million pounds. The most significant drop in exports of this type was to France, which took 6.4 million pounds in 1951 and none in 1952. However, increased takings by the Netherlands, Switzerland, the

United Kingdom, and Ireland helped offset this decrease. Exports of Virginia fire-cured increased from 4.5 million pounds in 1951 to 4.9 million in 1952, with Norway continuing as the most important outlet, taking 1.8 million pounds, or 37 percent of total exports. A downward trend in exports of all fire-cured leaf is indicated.

Maryland Tobacco exports in 1952 totaled 5.8 million pounds valued at \$4.2 million as compared with 8.0 million pounds valued at \$5.2 million in 1951. Switzerland remained the largest 1952 export outlet, taking 4.5 million pounds or 78 percent of the total. During 1951 Switzerland also took 4.5 million pounds, but only 56 percent of total exports.

One Sucker exports decreased substantially in 1952 as compared with 1951. Exports totaled 1.5 million pounds as compared with 3.6 million pounds in 1951. This decrease was caused by smaller exports to practically all countries, especially Spain, which took 1.9 million pounds in 1951 and none in 1952. Exports to the Cameroons and Switzerland increased slightly.

Green River leaf exports in 1952 totaled 2.3 million pounds, which represents 21 percent increase over the 1.9 million pounds in 1951. The postwar (1948-52) average is 1.9 million pounds as compared with the prewar average of 3.0 million pounds.

Cigar Tobacco exports in 1952 continue at a fairly high level of 6.8 million pounds, which is almost equal the 1951 total and nearly five times higher than the prewar annual average of 1.3 million pounds. Cigar wrapper accounted for 3.1 million pounds, or 46 percent of total exports; cigar binder, 2.8 million, or 41 percent and cigar filler, 0.9 million, or 13 percent.

Perique exports totaled 60,000 pounds during 1952 as compared with 53,000 pounds in 1951. The United Kingdom continued as the most important market, taking 39,000 pounds, or 65 percent of the total.

Black Fat exports during 1952 were 3.2 million pounds as compared with 4.9 million pounds in 1951. Nigeria and the Gold Coast continued as the most important markets, taking 1.4 and 1.3 million pounds, respectively, in 1952.

Stems, Trimmings and Scrap exports in 1952 were 3.6 million pounds, which was 9 percent below the 4.0 million pounds exported in 1951. This decrease was primarily attributable to smaller shipments to Hong Kong, which is only 0.1 million in 1952 as compared to nearly 1.1 million in 1951. This decrease was partially offset by larger shipments to Tangier, French Morocco, Norway, and to the Canary Islands.

UNITED STATES: Exports of unmanufactured tobacco by types
calendar year 1952, with comparisons

(Declared Weight)

Type	Average 1935-39		Average 1948-52		1951		1952 1/	
	1,000 pounds	1,000 dollars	1,000 pounds	1,000 dollars	1,000 pounds	1,000 dollars	1,000 pounds	1,000 dollars
Flue-cured								
Burley	312,889	112,466	371,664	211,143	433,768	279,888	318,024	200,804
Dark-fired Kentucky--	10,635	2,253	29,638	13,284	25,240	11,839	26,871	14,408
Tennessee	48,959	6,379	24,690	10,151	29,234	11,613	21,752	10,404
Dark-fired Virginia	9,049	2,101	5,492	2,987	4,479	2,644	4,860	3,024
Virginia Sun-cured 2/	-	-	-	-	-	-	277	151
Maryland	5,390	1,236	7,247	4,605	8,002	5,235	5,807	4,226
Green-River	3,019	609	1,872	690	1,925	534	2,260	1,071
One Sucker	956	82	2,977	1,186	3,571	1,658	1,520	1,156
Black Fat	8,867	1,629	4,324	2,586	4,939	2,868	3,204	2,426
Cigar leaf								
Wrapper	-	-	-	-	3,510	6,173	3,061	4,474
Binder	-	-	-	-	2,887	2,491	2,848	2,500
Filler	-	-	-	-	496	156	853	309
Total cigar leaf	1,269	524	9,876	10,280	6,893	8,820	6,762	7,283
Perique								
Trimnings, stems, and scrap	132	52	63	53	55	46	60	53
	19,632	466	6,002	498	3,982	383	3,622	387
Total	420,797	127,797	463,845	257,463	522,085	325,528	395,019	245,393

1/ Preliminary. 2/ Class established January 1952.

Compiled in Foreign Agricultural Service from the records of the Bureau of the Census.

UNITED STATES: Exports of flue-cured tobacco, calendar year 1952
with comparisons by countries of destination

Country of Destination	(Declared weight) Averages		1951	1952 1/
	1935-39	1948-52		
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
<u>NORTH AMERICA:</u>				
Canada	4,331	191	59	471
<u>CENTRAL AMERICA:</u>				
Mexico	3	510	228	738
Guatemala	55	341	528	348
British Honduras	19	32	10	12
El Salvador	38	581	619	610
Honduras	18	102	116	141
Nicaragua	93	332	333	384
Costa Rica	15	43	55	38
Panama, Republic of	10	6	-	-
Bermuda	1	-	-	-
Bahamas	-	1	1	4
Cuba	2	-	-	-
Jamaica	384	5	-	-
Haiti	13	89	72	106
Dominican Republic	3	-	-	-
Leeward and Windward Islands	-	55	39	76
Barbados	91	4	2	2
Trinidad and Tobago	449	102	106	23
Other British West Indies	29	-	-	-
Netherlands Antilles	3/	3/	-	1
French West Indies	1	-	-	-
<u>SOUTH AMERICA</u>				
Colombia	55	257	420	-
Venezuela	4	244	145	512
British Guiana	155	322	359	350
Surinam (Netherlands Guiana)	9	58	89	134
Ecuador	2	-	-	-
Peru	33	154	288	-
Chile	6	63	45	46
Brazil	41	19	-	-
Paraguay	1	12	5	20
Uruguay	229	896	1,712	247
Argentina	926	583	355	-
<u>EUROPE</u>				
Iceland	-	19	-	-
Sweden	3,642	6,448	11,955	6,576
Norway	2,487	4,488	3,771	4,314
Denmark	2,498	7,608	6,382	6,991
United Kingdom	193,519	146,076	220,551	49,794
Ireland	6,081	16,984	16,852	15,067

Continued -

UNITED STATES: Exports of flue-cured tobacco, calendar year 1952
with comparisons by countries of destination (Con't.)

(Declared weight)

Country of Destination	Averages		1951	1952 1/
	1935-39	1948-52		
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Netherlands	9,490	20,884	16,422	26,673
Belgium and Luxembourg	3,712	14,843	21,618	10,785
France	1,071	2,533	1,875	5,746
Germany	4,060	49,482	38,011	66,276
Austria	12	3,719	2,097	3,380
Czechoslovakia	16	-	-	-
Hungary	9	-	-	-
Switzerland	257	4,103	4,620	2,909
Finland	1,028	2,200	3,016	3,001
Estonia	169	-	-	-
Latvia	232	-	-	-
Lithuania	78	-	-	-
Poland and Danzig	811	-	-	-
USSR	-	1,189	-	-
Azores	4/ 20	48	102	72?
Spain	137	533	747	772
Portugal	803	3,328	1,398	2,853
Gibraltar	16	8	42	-
Malta, Gozo, and Cyprus	292	1,147	1,369	995
Italy	99	1,958	1,058	2,216
Free Territory of Trieste	-	157	-	-
Yugoslavia	1	273	-	1,350
Greece	1	8	-	-
Rumania	37	-	-	-
ASIA:				
Syria	(4	36	9	54
Lebanon	(	28	15	55
Iraq	3	-	-	-
Palestine	25	656	362	226
Jordan	-	174	310	247
Kuwait	-	31	-	-
Saudi Arabia	-	3	-	-
Aden	4	38	69	70
India	2,903	6,014	4,720	3,963
Pakistan	-	911	1,376	1,840
Ceylon	924	968	1,079	1,304
Thailand	3,202	4,252	6,292	6,126
French Indochina	190	1,881	1,818	2,817

Continued -

UNITED STATES: Exports of flue-cured tobacco, calendar year 1952
with comparisons by countries of destination (Con't.)

(Declared weight)				
Country of Destination	Averages		1951	1952 <u>1/</u>
	1935-39	1948-52		
	1,000 pounds	1,000 pounds		
British Malaya	118	-	-	-
Indonesia	2,021	8,433	11,720	13,203
Macao	-	6	-	30
Philippine Republic	703	12,601	8,388	28,386
Portuguese Asia	-	10	52	-
China	<u>5/</u> 33,885	4,068	-	-
Hong Kong	1,624	4,483	3,652	3,534
Taiwan	-	568	1,311	954
Japan	4,842	1,853	1,926	7,340
OCEANIA:				
Australia	19,093	19,827	20,130	23,224
New Zealand	2,708	5,507	6,640	5,132
AFRICA: Morocco	16	134	55	157
Algeria	(88	281	63	168
Tunisia	(	111	84	54
Egypt	926	2,711	3,016	2,612
Canary Islands	22	84	23	10
Spanish Africa	-	2	5	-
Cameroon	-	61	41	105
French Equatorial Africa	-	20	16	-
French West Africa	<u>6/</u> 132	112	-	-
Gold Coast	8	6	-	-
Nigeria	210	905	1,245	1,004
British West Africa	200	4	-	-
Madeira Islands	<u>4/</u> -	8	8	7
Angola	-	42	32	85
Western Portuguese Africa	<u>7/</u> 44	20	17	15
Liberia	6	5	-	-
Belgian Congo	-	95	145	124
Mauritius and Dependencies	-	120	-	110
British East Africa	-	1,108	1,340	991
Mozambique	13	56	76	40
Madagascar	-	3	4	4
Union of South Africa	66	390	257	-
Southern British Africa	2	-	-	-
Total quantity	312,889	371,664	433,768	318,024
Total value, 1,000 dollars	112,466	211,143	279,888	200,804

See footnotes at end of circular.

UNITED STATES: Exports of Burley tobacco, calendar year 1952 with
comparisons by countries of destination

(Declared weight)

Country of Destination	Averages		1951	1952 1/
	1935-39	1948-52		
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
NORTH AMERICA:				
Newfoundland				
Canada (Labrador)	453	33	-	-
CENTRAL AMERICA:				
Mexico	99	1,223	199	2,214
Guatemala	9	194	202	286
British Honduras	8	8	24	2
El Salvador	1	5	11	-
Honduras	3/	5	6	9
Nicaragua	47	108	121	146
Costa Rica	10	26	20	27
Panama, Republic of	-	3	3	-
Bahamas	-	3/	-	3
Haiti	2	35	46	46
Dominican Republic	23	-	-	-
Leeward and Windward Islands	-	2	3	9
Trinidad and Tobago	-	40	38	100
Other British West Indies	7	-	-	-
SOUTH AMERICA:				
Colombia	2	12	17	-
Venezuela		2	-	11
Surinam	2	33	-	-
Ecuador	1	-	-	-
Peru	4	66	108	109
Chile	8	92	102	171
Brazil	9	3	-	-
Uruguay	30	68	76	39
Argentina	160	398	303	-
EUROPE:				
Sweden	605	1,769	1,458	2,877
Norway	434	1,147	932	685
Denmark	827	1,686	1,393	1,710
United Kingdom	279	522	331	280
Ireland	10	3	-	4
Netherlands	1,000	1,836	1,310	783
Belgium and Luxembourg	1,996	3,602	2,566	2,715
France	214	409	650	974

Continued -

UNITED STATES: Exports of Burley tobacco, calendar year 1952 with comparisons by countries of destination (cont'd.)

Country of Destination	(Declared weight) Averages		1951	1952 1/
	1939-39	1948-52		
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Germany	467	7,613	5,361	7,677
Austria	17	1,015	1,136	1,204
Czechoslovakia	25	-	-	-
Hungary	3	-	-	-
Switzerland	46	534	716	338
Finland	72	315	478	458
Estonia	1	-	-	-
Latvia	5	-	-	-
Lithuania	7	-	-	-
Poland and Danzig	43	-	-	-
Azores	4/ 3	29	41	16
Spain	69	170	794	-
Portugal	2,498	4,468	4,165	1,870
Gibraltar	1	-	-	-
Malta, Gozo, and Cyprus	10	-	-	-
Italy	145	102	476	24
Free Territory of Trieste	-	20	-	-
ASIA:				
Syria	(3/	5	6	8
Lebanon	(3/	30	8	-
Israel and Palestine	-	3	-	-
India	3/	4	9	9
Ceylon	10	-	-	-
Siam (Thailand)	-	7	35	-
French Indochina	-	-	-	-
French India	8	18	26	15
Indonesia	101	42	205	4
Republic of the Philippines	5	603	921	1,165
China	32	1	-	-
Hong Kong	-	11	-	38
Taiwan (Formosa)	-	1	-	5
Japan	1	1	5	3/
OCEANIA:				
Australia	557	135	77	114
New Zealand	3	-	-	-
AFRICA:				
French Morocco	3/	46	-	-
Algeria . . . . .	(	102	68	21
Tunisia	(213	90	-	102

Continued -

UNITED STATES: Exports of Burley tobacco, calendar year 1952 with
comparisons by countries of destination (cont'd.)

Country of Destination	(Declared weight)			
	Averages		1951	1952 <u>1/</u>
	1935-39	1948-52		
	<u>1,000</u> <u>pounds</u>	<u>1,000</u> <u>pounds</u>	<u>1,000</u> <u>pounds</u>	<u>1,000</u> <u>pounds</u>
Egypt	21	873	710	536
Canary Islands	3	-	-	-
French West Africa	6/ 3	12	-	-
Gold Coast	1	3/	-	3
Nigeria	5	-	-	-
Madeira Islands	4/	1	-	2
Angola	-	40	53	42
Western Portuguese Africa, n.e.s.	20	1	-	-
Liberia	3/	3/	-	3
Belgian Congo	-	6	22	-
Mozambique	-	6	5	10
Union of South Africa	3/	5	4	7
Total Quantity	10,635	29,638	25,240	26,871
Total value, <u>at 1,000</u> dollars	2,253	13,284	11,839	14,408

See footnotes at end of circular.

UNITED STATES: Exports of Kentucky-Tennessee Fire-cured tobacco,
calendar year 1952 with comparisons, by countries of destination

Country of Destination	(Declared weight)		1951	1952 1/
	Averages			
	1935-39	1948-52		
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
NORTH AMERICA:				
Canada	151	58	47	73
CENTRAL AMERICA:				
Mexico	47	3/	3/	-
Guatemala	-	15	-	76
British Honduras	1	29	46	26
El Salvador	13	-	-	-
Honduras	3/	2	-	-
Nicaragua	2	-	-	-
Panama, Republic of	118	57	74	67
Bahamas	-	47	46	79
Cuba	-	5	-	-
Jamaica	2	2	3	2
Haiti	9	22	-	99
Leeward and Windward Islands:	-	25	32	21
Trinidad and Tobago	8	3	9	1
Netherlands Antilles	4	4	4	1
French West Indies	56	5	2	-
Other British West Indies	19	-	-	-
SOUTH AMERICA:				
Venezuela	1	-	-	-
British Guiana	63	41	65	41
Surinam (Netherlands Guiana):	9	15	41	15
French Guiana	6	2	6	-
Brazil	23	27	24	20
Paraguay	2	-	-	-
Uruguay	28	39	110	-
Argentina	150	187	9	-
EUROPE:				
Iceland	-	65	72	71
Sweden	2,191	1,703	468	1,661
Norway	548	375	184	401
Denmark	1,055	547	372	466
United Kingdom	2,739	1,283	1,425	2,633
Ireland	724	730	744	1,038
Netherlands	4,832	4,523	4,695	7,084
Belgium and Luxembourg	4,441	2,094	3,435	1,024
France	18,316	4,325	6,418	-
Germany	3,022	1,131	671	732
Austria	29	47	50	20

Continued -

UNITED STATES: Exports of Kentucky-Tennessee Fire-cured tobacco,
calendar year 1952 with comparisons, by countries of destination

Country of Destination	(Declared weight) Averages		1951	1952 <u>1/</u>
	1935-39	1948-52		
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
<u>EUROPE (Continued):</u>				
Switzerland	2,273	2,411	1,982	2,328
Finland	82	72	167	-
Estonia	5	-	-	-
Latvia	32	-	-	-
Lithuania	6	-	-	-
Poland and Danzig	858	-	-	-
Azores	<u>4/</u> 30	87	94	57
Spain	2,568	400	1,998	-
Portugal	1,107	394	351	363
Gibraltar	3	-	-	-
Malta, Gozo, and Cyprus	145	53	50	4
Italy	427	874	681	626
Yugoslavia	3	-	-	-
<u>ASIA:</u>				
Aden	1	-	-	-
India	12	4	4	13
French Indochina	235	71	-	243
British Malaya	1	-	-	-
Indonesia	69	67	243	87
Republic of the Philippines	5	-	-	-
China	1	-	-	-
Japan	20	2	3	8
<u>OCEANIA:</u>				
Australia	3	1	-	7
New Zealand	5	87	84	87
<u>AFRICA:</u>				
French Morocco	44	164	332	-
Tangier	-	19	1	-
Algeria	(767	431	650	101
Tunisia . . . . .	(	353	554	282
Egypt	285	187	63	83
Canary Islands	507	182	227	140
Spanish Africa, n.e.s.	18	14	63	1
Cameroon	-	180	434	179
French Equatorial Africa	-	116	342	21
French West Africa	<u>6/</u> 635	439	1,038	111
Gold Coast	102	353	488	544
Nigeria	19	40	70	10
British West Africa, n.e.s.	20	5	-	-
Angola	-	14	29	4
Western Portuguese Africa, n.e.s.	<u>7/</u> 29	109	132	238

Continued -

UNITED STATES: Exports of Kentucky-Tennessee Fire-cured tobacco
calendar year 1952 with comparisons, by countries of destination
(Con't.)

Country of Destination	(Declared weight) Averages		1951	1952 1/
	1935-39	1948-52		
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
<u>AFRICA: (Continued)</u>				
Liberia	25	34	61	39
Belgian Congo	2	111	25	525
Mozambique	3/	3/	2	-
Madagascar	5	8	14	-
Union of South Africa	1	-	-	-
Total quantity	48,959	24,690	29,234	21,752
Total value, 1,000 dollars	6,379	10,151	11,613	10,404

See footnotes at end of circular.

UNITED STATES: Exports of Virginia Fire-cured Tobacco, calendar year 1952
with comparisons by countries of destination

(Declared weight)					
Country of Destination	Averages		1951	1952 1/	
	1935-39	1948-52			
	1,000 pounds	1,000 pounds			
NORTH AMERICA:					
Canada	143	2	-	-	
CENTRAL AMERICA:					
Mexico	34	12	-	-	
Guatemala	3/	3	-	-	
El Salvador	4	-	-	-	
Costa Rica	12	-	-	-	
Panama, Republic of	1	1	-	-	
Leeward and Windward Islands	-	2	10	1	
Barbados	4	-	-	-	
Trinidad and Tobago	63	126	143	122	
Netherlands Antilles	2	-	-	-	
Other British West Indies	4	-	-	-	
SOUTH AMERICA:					
Colombia	1	-	-	-	
Venezuela	1	-	-	-	
British Guiana	1	-	-	-	
Surinam	2	-	-	-	
Ecuador	1	-	-	-	
Peru	4	21	-	109	
Bolivia	3/	1	-	-	
Brazil	2	-	-	-	
Paraguay	4	3	-	-	
Uruguay	10	1	6	-	
Argentina	112	-	-	-	
EUROPE:					
Sweden	815	569	-	867	
Norway	2,033	1,850	1,595	1,767	
Denmark	171	97	23	12	
United Kingdom	1,471	395	571	156	
Ireland	161	21	23	16	
Netherlands	455	376	128	5	
Belgium and Luxembourg	356	156	94	63	
France	197	14	-	-	
Germany	1,005	347	174	418	
Austria	92	327	420	416	
Czechoslovakia	109	30	38	-	
Switzerland	130	450	523	464	
Finland	10	27	-	-	

Continued -

UNITED STATES: Exports of Virginia Fire-cured tobacco, calendar year 1952
with comparisons by countries of destination (Con't.)

Country of Destination	(Declared Weight) Average		1951	1952 <u>1/</u>
	1935-39	1948-52		
	<u>1,000</u> <u>pounds</u>	<u>1,000</u> <u>pounds</u>	<u>1,000</u> <u>pounds</u>	<u>1,000</u> <u>pounds</u>
Estonia	7	-	-	-
Latvia	8	-	-	-
Lithuania	2	-	-	-
Poland and Danzig	11	-	-	-
Azores	<u>4/</u> 6	-	-	-
Portugal	345	68	107	-
Malta, Gozo, and Cyprus	5	-	-	-
Italy	85	11	27	15
Yugoslavia	5	-	-	-
Greece	2	-	-	-
Rumania	2	-	-	-
ASIA:				
Israel and Palestine	-	7	-	-
Aden	2	-	-	-
India	4	28	26	19
French Indochina	3	20	38	9
Indonesia	36	-	-	-
Philippines, Republic of	<u>3/</u>	27	22	-
China	28	-	-	-
Hong Kong	-	17	-	-
Taiwan	-	10	-	-
OCEANIA:				
Australia	236	146	64	192
New Zealand	276	272	378	209
AFRICA:				
French Morocco	-	6	-	-
Algeria and Tunisia	170	1	-	-
Egypt	22	3	-	-
Canary Islands	8	5	-	-
Spanish Africa	4	-	-	-
Cameroon	-	25	43	-
French West Africa	<u>6/</u> 235	5	-	-
Gold Coast	25	2	2	-
British West Africa	10	-	-	-
Angola	-	3	-	-
Western Portuguese Africa	<u>7/</u> 10	1	4	-
Liberia	82	4	20	-
Mozambique	5	-	-	-
Madagascar	5	-	-	-
Total quantity	9,049	5,492	4,479	4,860
Total value, 1,000 dollars	2,101	2,987	2,644	3,024

See footnotes at end of circular.

UNITED STATES: Exports of Virginia sun-cured tobacco 2/
calendar year by countries of destination

(Declared weight)	
Country of Destination	1952 <u>1/</u>
	<u>1,000 pounds</u>
<u>CENTRAL AMERICA:</u>	
Leeward and Windward Islands	2
<u>EUROPE:</u>	
Norway	274
Netherlands	1
Total quantity	<u>277</u>
Total value, 1,000 dollars	<u>151</u>

UNITED STATES: Exports of Black Fat, Water Baler, and Dark African tobacco
calendar year 1952 with comparisons by countries of destination

(Declared weight)				
Country of Destination	Averages		1951	1952 <u>1/</u>
	1935-39	1948-52		
	<u>1,000 pounds</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>
<u>NORTH AMERICA:</u>				
Canada	2	1	-	-
<u>CENTRAL AMERICA:</u>				
British Honduras	44	8	-	-
El Salvador	1	-	-	-
Nicaragua	3	-	-	-
Panama, Republic of	6 <u>3/</u>		-	-
Bahamas	-	51	51	41
Jamaica	1	2	2	4
Haiti	8	4	5	4
Dominican Republic	1	1	-	-
Leeward and Windward Islands	-	14	4	8
Barbados	2	-	-	-
Trinidad and Tobago	1	1	-	-
Netherlands Antilles	77	37	38	35
French West Indies	141 <u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>
Other British West Indies	154	-	-	-
<u>SOUTH AMERICA:</u>				
British Guiana	112	24	-	-
Surinam	37	6	2	4
French Guiana	28	4	2	-
<u>EUROPE:</u>				
Norway	1	-	-	-
Denmark	7	-	-	-

Continued -

UNITED STATES: Exports of Black Fat, Water Baler, and Dark African tobacco
calendar year 1952 with comparisons by countries of destination (Con't.)

(Declared weight)				
Country o f Destination	Averages		1951	1952 1/
	1935-39	1948-52		
	1,000 pounds	1,000 pounds		
United Kingdom	13	-	-	-
Netherlands	28	6	-	2
Belgium and Luxembourg	89	-	-	-
Germany	168	-	-	-
Austria	1	-	-	-
Switzerland	3 3/	-	-	-
Azores	4/ 1	-	-	-
Portugal	7	13	-	-
Malta, Gozo, and Cyprus	5	-	-	-
ASIA:				
India	4	-	-	-
China	2	8	-	-
OCEANIA:				
Australia	2	-	-	-
AFRICA:				
French Morocco	1	-	-	-
Algeria and Tunisia	3	-	-	-
Egypt	4	-	-	-
Anglo-Egyptian Sudan	-	1	4	-
Canary Islands	104	39	82	31
Spanish Africa	67	7	4	16
Cameroon	-	82	83	30
French Equatorial Africa	-	127	250	-
French West Africa	6/ 2,691	521	1,278	3
Gold Coast	1,301	1,223	1,184	1,332
Nigeria	2,687	1,866	1,749	1,426
British West Africa	481	-	-	-
Angola	-	21	-	93
Western Portuguese Africa	7/ 326	243	179	170
Liberia	215	11	22	-
Belgian Congo	7	2	-	5
Seychelles and Dependencies	-	1	-	-
British East Africa	1 3/	-	-	-
Mozambique	2	-	-	-
Madagascar	7	-	-	-
Union of South Africa	2	-	-	-
Southern British Africa	4	-	-	-
Total Quantity	8,867	4,324	4,939	3,204
Total value, 1,000 dollars	1,629	2,586	2,868	2,426

See footnotes at end of circular.

UNITED STATES: Exports of Maryland tobacco, calendar year 1952
with comparisons, by country of destination

Country of Destination	(Declared weight) Averages		1951	1952 1/
	1935-39	1948-52		
	1,000	1,000		
	pounds	pounds	pounds	pounds
<u>NORTH AMERICA:</u>				
Canada	3/	4	-	-
<u>CENTRAL AMERICA:</u>				
Guatemala	3/	3	1	15
Honduras	3/	1	1	2
Trinidad and Tobago	-	2	-	8
<u>EUROPE:</u>				
Sweden	26	-	-	-
Norway	5	9	7	-
Denmark	127	46	55	26
United Kingdom	34	26	-	-
Netherlands	1,833	297	373	378
Belgium and Luxembourg	427	226	223	138
France	668	256	1,049	5
Germany	173	344	154	184
Austria	52	24	24	-
Czechoslovakia	8	-	-	-
Switzerland	1,602	5,073	4,469	4,519
Finland	-	4	-	-
Estonia	5	-	-	-
Poland and Danzig	2	-	-	-
Spain	21	114	441	83
Portugal	-	3	-	-
Italy	19 3/	-	-	1
<u>ASIA:</u>				
Israel	-	1	-	-
Thailand	- 3/	-	1	-
French Indochina	-	10	-	-
Philippines, Republic of	3/	54	43	-
China	2	-	-	-
<u>OCEANIA:</u>				
Australia	1	5	-	11
<u>AFRICA:</u>				
French Morocco	49	418	652	278
Algeria	333	57	39	15
Tunisia	-	270	470	143
Egypt	1	-	-	-
Canary Islands	1	-	-	-
Liberia	1 3/	-	-	-
Mozambique	- 3/	-	-	1
Total quantity	5,390	7,247	8,002	5,807
Total value, 1,000 dollars	1,236	4,605	5,235	4,226

See footnotes at end of circular.

UNITED STATES: Exports of One Sucker tobacco, calendar year 1952
with comparisons by countries of destination

(Declared weight)					
Country of Destination	Averages		1951	1952 1/	
	1935-39	1948-52			
	1,000 pounds	1,000 pounds			
			1,000 pounds	1,000 pounds	
NORTH AMERICA:					
Canada	30	13	-	-	
CENTRAL AMERICA:					
Haiti	1	-	-	-	
Barbados	3	-	-	-	
Trinidad and Tobago	51	47	60	42	
French West Indies	2	-	-	-	
SOUTH AMERICA:					
Surinam	-	2	-	-	
Argentina	1	-	-	-	
EUROPE:					
Norway	3/	10	14	11	
Denmark	6	3/	-	-	
United Kingdom	5	14	-	2	
Ireland	2	-	-	-	
Netherlands	14	204	208	13	
Belgium and Luxembourg	682	277	473	188	
France	-	594	-	-	
Germany	13	73	6	-	
Austria	-	11	-	-	
Switzerland	9	4	-	12	
Spain	-	242	1,212	-	
ASIA:					
Philippines, Republic of	2	-	-	-	
Portuguese Asia	-	1	7	-	
AFRICA:					
French Morocco	-	60	-	-	
Algeria	-	44	-	-	
Tunisia	-	113	73	-	
Canary Islands	16	-	-	-	
Spanish Africa	1	-	-	-	
Cameroon	-	26	19	41	
French Equatorial Africa	-	26	4	-	
French West Africa	6/	58	44	42	
Gold Coast	11	41	58	9	
Nigeria	5	998	1,290	1,152	
British West Africa	25	-	-	-	
Western Portuguese Africa	7/	49	31	-	
Liberia	13	70	72	8	
Total quantity	956	2,977	3,571	1,520	
Total value, 1,000 dollars	82	1,186	1,658	1,156	

See footnotes at end of circular.

UNITED STATES: Exports of Green River tobacco, calendar year 1952
with comparisons by countries of destination

(Declared weight)					
Country of Destination	Averages		1951	1952 1/	
	1935-39	1948-52			
	1,000 pounds	1,000 pounds			
NORTH AMERICA:					
Canada	5	-	-	-	
CENTRAL AMERICA:					
Haiti	-	7	5	13	
Trinidad and Tobago	-	3/	2	-	
French West Indies	4	-	-	-	
EUROPE:					
Sweden	11	3/	-	-	
Norway	9	4	22	-	
Denmark	1	-	-	-	
United Kingdom	1,957	595	477	1,286	
Ireland	156	38	-	40	
Netherlands	37	272	38	348	
Belgium and Luxembourg	716	224	224	151	
France	3/	217	-	-	
Germany	1	50	-	-	
Azores	4/	1	-	-	
Spain	-	173	867	-	
ASIA:					
Indonesia	-	57	-	287	
AFRICA:					
Egypt	1	-	-	-	
Cameroon	-	12	28	-	
French Equatorial Africa	-	1	7	-	
French West Africa	6/	73	-	-	
Gold Coast	46	3	-	-	
Nigeria	-	6	9	9	
British West Africa	1	-	-	-	
Liberia	-	202	246	126	
Total Quantity	3,019	1,872	1,925	2,260	
Total value, 1,000 dollars	609	600	534	1,071	

See footnotes at end of circular.

UNITED STATES: Exports of total cigar leaf tobacco, calendar year 1952
with comparisons by countries of destination

Country of Destination	(Declared weight) Averages		1951	1952 1/
	1935-39	1948-52		
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
NORTH AMERICA:				
Canada	73	365	365	305
CENTRAL AMERICA:				
Mexico	3/	24	6	56
Guatemala	-	5	-	-
El Salvador	3	3/	3/	3/
Honduras	3/	1	3/	-
Nicaragua	3/	24	-	-
Panama, Republic of	4	5	-	-
Bermuda	-	3/	1	1
Jamaica	3/	1	2	-
Haiti	-	4	5	2
Dominican Republic	3/	12	1	55
Trinidad and Tobago	-	7	-	-
Other British West Indies	1	-	-	-
SOUTH AMERICA:				
Colombia	1	10	16	2
Surinam	-	6	1	2
French Guiana	3	-	-	-
Brazil	3/	76	133	88
Uruguay	-	1	2	1
Argentina	3/	10	3	-
EUROPE:				
Sweden	-	217	131	121
Norway	1	17	13	2
Denmark	-	701	660	154
United Kingdom	134	21	28	3
Ireland	-	1	-	-
Netherlands	80	590	679	507
Belgium and Luxembourg	23	592	818	523
France	140	3/	-	2
Germany	339	5,237	3,068	4,040
Austria	2	376	344	157
Czechoslovakia	-	5	-	-
Switzerland	-	98	36	24
U.S.S.R.	-	12	-	-
Azores	4/	1	4	3
Spain	-	22	-	-

Continued -

UNITED STATES: Exports of total cigar leaf tobacco, calendar year 1952
with comparisons by countries of destination (Con't.)

Country of Destination	(Declared weight)			
	Averages		1951	1952 <u>1/</u>
	1935-39	1948-52		
	1,000 pounds	1,000 pounds		
Portugal	-	36	12	-
Gibraltar	3/	11	40	14
Malta, Gozo, and Cyprus	-	12	-	-
Free Territory of Trieste	-	9	18	-
ASIA:				
Israel and Palestine	-	5	12	8
India	-	2	4	3
French Indochina	-	79	4	342
Indonesia	1	-	-	-
Philippines, Republic of	449	84	71	36
China	-	1	-	-
Japan	1	-	-	-
OCEANIA:				
Australia	1	15	18	3
New Zealand	3/	2	9	-
AFRICA:				
French Morocco	-	180	-	-
Tangier	-	5	3	3
Algeria	{ 1	799	263	192
Tunisia	{	81	53	60
Egypt	1 3/	-	-	-
Canary Islands	3/	41	32	49
Spanish Africa	-	1	9	-
Cameroon	-	23	10	53
French West Africa	6/ 1	33	-	-
Gold Coast	1	1	-	-
Nigeria	1	-	-	-
British West Africa	2	-	-	-
Angola	-	1	5	-
Western Portuguese Africa	7/ 1	3	14	-
Liberia	1	8	-	-
Mozambique	3	-	-	-
Union of South Africa	3/	1	-	1
Total Quantity	1,269	9,876	6,893	6,762
Total value, 1,000 dollars	524	10,280	8,820	7,283

See footnotes at end of table.

UNITED STATES: Exports of cigar wrapper ⁸/_{calendar year 1952 with}
comparisons by countries of destination

(Declared weight)

Country of Destination	1949	1950	1951	1952 ¹ /
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
NORTH AMERICA:				
Canada	247	302	295	140
CENTRAL AMERICA:				
Mexico	3	3	5	5
Haiti	-	-	-	1
Dominican Republic	³ /	1	1	1
SOUTH AMERICA:				
Colombia	12	3	16	2
Venezuela	-	1 ³ /	³ /	³ /
Surinam	1	3	1	1
Brazil	25	103	126	88
Uruguay	-	1	2	1
Argentina	-	2	3	-
EUROPE:				
Sweden	-	-	1	5
Norway	2	1	2	2
Denmark	394	146	245	59
United Kingdom	3	2	3	2
Netherlands	111	94	149	172
Belgium and Luxembourg	76	112	107	158
France	³ /	-	-	2
Germany	2,002	2,375	2,251	2,300
Austria	95	148	119	-
Czechoslovakia	8	15	-	-
Switzerland	13	29	20	11
U.S.S.R.	58	-	-	-
Azores	6	-	4	3
Free Territory of Trieste	-	-	3	-
ASIA:				
Israel and Palestine	-	-	1	3
India	3	-	4	3
French Indochina	5	12	4	2
Philippines, Republic of	53	32	71	36
OCEANIA:				
Australia	-	3	6	-
AFRICA:				
Tangier	-	11	3	3
Algeria	16	28	27	11
Tunisia	1	-	-	-
Canary Islands	26	43	32	49
Spanish Africa	-	-	9	-
Union of South Africa	1 ³ /	-	-	1
Total Quantity	3,161	3,450	3,510	3,061
Total Value, 1,000 dollars	6,030	6,148	6,173	4,474
See footnotes at end of circular.				

UNITED STATES: Exports of cigar binder tobacco 8/ calendar year 1952 with comparisons by countries of destination

(Declared weight)				
Country of Destination	1949	1950	1951	1952 <u>1/</u>
	<u>1,000 pounds</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>
<u>NORTH AMERICA:</u>				
Canada	147	52	39	103
<u>CENTRAL AMERICA:</u>				
Mexico	-	35	-	-
Guatemala	23	-	1	-
Honduras	4	-	-	-
Nicaragua	26	-	-	-
Panama, Republic of	9 <u>3/</u>	-	-	-
Haiti	-	10	-	<u>3/</u>
Dominican Republic	-	-	-	54
Trinidad and Tobago	12	-	-	-
<u>SOUTH AMERICA:</u>				
Surinam	18 <u>3/</u>	-	-	-
Brazil	-	1	7	-
<u>EUROPE:</u>				
Sweden	75	27	130	116
Norway	27	4	-	-
Denmark	493	226	415	96
United Kingdom	53	5	26	1
Netherlands	773	424	529	335
Belgium and Luxembourg	303	413	591	333
France	1	-	-	-
Germany	6,268	1,150	816	1,629
Austria	314	240	225	157
Switzerland	111	19	8	13
Spain	-	111	-	-
Portugal	84	-	12	-
Malta, Gozo, and Cyprus	46	-	-	-
Italy	-	2	-	-
Free Territory of Trieste	-	27	15	-
<u>ASIA:</u>				
Israel and Palestine	1	3	12	5
French Indochina	29	-	-	3
China	8	-	-	-
<u>OCEANIA:</u>				
Australia	13	5	12	3
New Zealand	3	-	9	-

:Continued -

UNITED STATES: Exports of cigar binder tobacco 8/ calendar year 1952 with comparisons by countries of destination (Con't.)

(Declared weight)

Country of Destination	1949	1950	1951	1952 1/
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
<u>AFRICA:</u>				
Algeria	122	-	10	-
Tunisia	16	-	-	-
Canary Islands	-	1	-	-
Cameroon	21	-	10	-
French West Africa	36	-	-	-
Gold Coast	4	-	-	-
Angola	-	-	5	-
Western Portuguese Africa	-	-	14	-
Total Quantity	9,040	2,755	2,887	2,848
Total value, 1,000 dollars	9,338	2,336	2,491	2,500

UNITED STATES: Exports of cigar filler tobacco 8/ calendar year 1952 with comparisons by country of destination

(Declared weight)

Country of Destination	1949	1950	1951	1952 1/
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
<u>NORTH AMERICA:</u>				
Canada	16	-	31	61
<u>CENTRAL AMERICA:</u>				
Mexico	5	-	-	1
Bermuda	-	3/	1	3/
Jamaica	-	1	1	-
Haiti	-	-	5	1
<u>SOUTH AMERICA:</u>				
Colombia	-	10	-	-
<u>EUROPE:</u>				
Norway	1	3/	11	-
Denmark	44	5	-	-
Netherlands	114	-	-	3/
Belgium and Luxembourg	172	97	119	32
Germany	5,702	191	1	112
Austria	290	-	-	-
Switzerland	-	27	7	-
Gibraltar	-	-	40	14

;Continued -

UNITED STATES: Exports of cigar filler tobacco 8/calendar year 1952 with comparisons by country of destination (Con't.)

(Declared weight)				
Country of Destination	1949	1950	1951	1952 1/
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
ASIA:				
French Indochina	-	-	-	337
Philippines, Republic of	-	197	-	-
AFRICA:				
French Morocco	677	-	-	-
Algeria	2,656	568	226	182
Tunisia	276	-	53	60
Cameroon	31	-	-	53
French West Africa	128	-	-	-
Total Quantity	10,112	1,096	496	853
Total value, 1,000 dollars	3,403	407	156	309

UNITED STATES: Exports of Perique tobacco calendar year 1952 with comparisons by country of destination

(Declared Weight)				
Country of Destination	Averages		1951	1952 1/
	1935-39	1948-52		
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
NORTH AMERICA:				
Canada	26	9	-	-
SOUTH AMERICA:				
Colombia	-	11	22	-
Argentina	1	-	-	-
EUROPE:				
Norway	13	17	10	11
Denmark	3/	1	1	2
United Kingdom	86	25	36	39
Ireland	1	1	-	-
Netherlands	1	1	3	-
Belgium and Luxembourg	1 3/	-	2	-
Germany	1	1	-	-
Austria	-	1	-	-
Switzerland	3/	5	-	-
Finland	2	-	-	-
Italy	3/	1	1	-

Continued -

UNITED STATES: Exports of Perique tobacco calendar year 1952 with comparisons by country of destination (Cont.)

Country of Destination	(Declared weight) Averages		1951	1952 1/
	1935-39	1948-52		
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
ASIA:				
Japan	-	1	-	6
Total Quantity	132	63	55	60
Total value, 1,000 dollars	52	53	46	53

UNITED STATES: Exports of Trimmings, stems, and scrap tobacco calendar year 1952 with comparisons by country of destination

Country of Destination	(Declared weight) Averages		1951	1952 1/
	1935-39	1948-52		
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
NORTH AMERICA:				
Canada	1	-	-	5
CENTRAL AMERICA:				
Mexico	2	-	-	-
Netherlands Antilles	2	-	-	-
Other British West Indies	1	-	-	-
SOUTH AMERICA:				
Uruguay	-	19	47	9
EUROPE:				
Sweden	1,060	992	981	864
Norway	108	158	78	376
Denmark	201	323	238	198
United Kingdom	169	46	-	-
Netherlands	20	372	465	147
Belgium and Luxembourg	67	46	118	56
France	1	-	-	-
Germany	1,277	245	243	236
Austria	-	22	-	-
Switzerland	16	50	100	71
Finland	1	-	-	-
Latvia	2	-	-	-
Poland and Danzig	9	-	-	-
Spain	2	1	-	-
Gibraltar	3	-	-	-
Malta, Gozo, and Cyprus	2	3	4	-

: Continued -

UNITED STATES: Exports of trimmings, stems, and scrap tobacco
calendar year 1952 with comparisons by country
of destination (Con't.)

Country of Destination	(Declared weight) Average		1951	1952 ^{1/}
	1935-39	1948-52		
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
<u>ASIA:</u>				
Israel and Palestine	-	2	-	-
Jordan	-	66	114	144
Kuwait	-	10	-	-
India	^{3/}	^{3/}	2	-
French Indochina	2	-	-	-
Indonesia	10	-	-	-
Macao	-	4	-	20
Philippines, Republic of	203	142	20	111
China	15,180	2,310	-	-
Kwantung	774	-	-	-
Hong Kong	2	573	1,059	75
Japan	421	-	-	-
<u>AFRICA:</u>				
French Morocco	-	202	178	453
Tangier	-	341	293	703
Algeria	^{6/}	-	-	-
Tunisia	^{6/}	-	-	-
Egypt	-	4	-	-
Canary Islands	76	54	19	106
Spanish Africa	^{3/}	17	23	48
French West Africa	^{6/}	9	-	-
Western Portuguese Africa	^{7/}	5	-	-
Total Quantity	19,632	6,002	3,982	3,622
Total Value, 1,000 dollars	466	498	383	387

1/ Preliminary. 2/ Class established January 1952. 3/ Less than 500 pounds.
4/ Includes Madeira Islands for 1935-39. 5/ Does not include 1,313 thousand
pounds to Kwantung which is included in grand total. 6/ Includes all French
possessions in Africa n.e.i. 7/ Includes all Portuguese possessions in Africa
n.e.i. 8/ Class breakdown established January 1949.

Compiled in Foreign Agricultural Service from records of the Bureau of the
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UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT 7-53

April 14, 1953

UNITED STATES EXPORTS OF MANUFACTURED TOBACCO PRODUCTS

The value of United States exports of tobacco products during 1952 was \$58.9 million which was slightly above the \$56.7 million exported in 1951 and over 5 times greater than the prewar (1934-38) annual average value of \$10.8 million. Cigarette exports accounted for 93.7 percent of total tobacco products value in 1952; chewing tobacco 3.3 percent of total value; smoking tobacco 2.5 percent; and cigars 0.6 percent. Manufactured tobacco exports seem to have stabilized at about \$55 million annually under current economic conditions in the major importing countries.

Exports of manufactured tobacco products during 1952 with comparisons

Product	Average 1934-38		Average 1948-52		1951		1952 ^{1/}	
	Quan- tity	Value	Quan- tity	Value	Quan- tity	Value	Quan- tity	Value
		1,000		1,000		1,000		1,000
		dollars		dollars		dollars		dollars
Cigarettes (million pieces)	4,774	9,058	18,436	54,730	16,808	53,436	16,352	54,754
Cigars and cheroots (1,000 pieces)	8,201	435	5,111	353	3,402	194	3,273	177
Smoking tobacco (1,000 pounds)	967	601	2,140	1,434	2,553	2,019	2,864	2,455
Chewing tobacco and other (1,000 pounds)	1,787	708	2,344	1,921	1,374	1,070	1,920	1,547
Total		10,802		58,438		56,719		58,933

^{1/} Preliminary.



Cigarettes

During 1952 cigarette exports totaled 16.4 billion pieces valued at \$54.8 million as compared with 16.8 billion pieces valued at \$53.4 million in 1951. Cigarette exports have shown a substantial increase over the prewar (1934-38) average of 4.8 billion pieces valued at \$9.1 million. A high 1948-52 average which totaled 18.4 billion pieces valued at \$54.7 million is attributed to larger takings by the Philippine Republic. However, this outlet has changed from a market for manufactured products to a market for leaf tobacco. During 1952 exports of cigarettes increased to all areas except Asia which decreased sufficiently to more than offset the increase of shipments elsewhere. The large decrease in Asia was attributed to smaller 1952 takings by the Philippine Republic, British Malaya, and Hong Kong.

Cigars and Cheroots

Exports of cigars and cheroots during the 1952 calendar year totaled 3.3 million pieces valued at \$177,000. This compares with 3.4 million pieces valued at \$194,000 in 1951. However, the 1952 and 1951 exports show a substantial decline as compared to the prewar (1934-38) average of 8.2 million pieces valued at \$435,000. The postwar decrease is primarily attributed to smaller takings of United States cigars and cheroots by the United Kingdom and Italy.

Smoking Tobacco

In 1952 the value of smoking tobacco exports totaled \$2,455,000 which is slightly above the \$2,019,000 exported in 1951 and more than three times greater than the prewar average of \$601,000. A comparison of export data shows a trend toward a steadily increasing export market for smoking tobacco during postwar years.

Chewing Tobacco and Other

Export value during 1952 was nearly 45 percent above 1951 and over twice as large as the prewar annual (1934-38) average. However, the 1952 volume was 40 percent above 1951 and only 2 percent above the prewar average, indicating the establishment of a relatively stable postwar export market and at higher price per unit for these products. Australia and the Philippine Republic, the largest prewar markets, continue as the leading outlets during the postwar years. These two countries took 85 percent of the 1952 chewing, plug, and other.

CIGARETTES: Exports by country of destination during 1952 with comparisons

Continent and Country	Averages		1951	1952 <u>1/</u>
	1934-38	1948-52		
	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces
NORTH AMERICA:				
Iceland	106	36,096	77,130	78,780
Canada	18,331	335,626	372,490	533,109
Miquelon & St. Pierre	6,119	2,952	1,500	1,580
Mexico	30,776	294,061	408,278	165,994
Costa Rica	28,528	28,068	14,810	24,349
Panama Republic	(388,844	471,867	448,546	644,823
Panama Canal Zone	(	213,977	209,520	172,302
Bermuda	29,804	59,962	66,766	66,494
Cuba	46,834	329,355	357,917	396,126
Haiti	19,147	73,221	63,880	62,192
Curacao (N.W.I)	105,226	-	-	-
Netherlands Antilles	-	1,019,092	769,100	846,495
Other	42,029	88,739	121,490	100,572
Total North America	715,744	2,953,015	2,911,517	3,092,816
SOUTH AMERICA:				
Colombia	90,778	242,554	165,845	260,524
Venezuela	38,688	1,181,296	1,699,959	1,570,147
Ecuador	6,698	126,837	142,554	185,400
Peru	10,454	62,730	57,070	57,720
Uruguay	7,804	148,427	137,027	180,836
Argentina	63,643	13,199	770	3,595
Other	8,827	29,741	38,144	38,020
Total South America	226,892	1,804,784	2,241,369	2,296,242
EUROPE:				
Sweden	79,755	495,459	599,952	654,400
France	307,224	383,530	739,337	851,737
United Kingdom	98,754	27,879	39,874	28,895
Netherlands	127,916	205,342	249,750	255,930
Ireland	203	10,777	14,420	17,130
Belgium	63,404	984,680	877,750	813,690
Switzerland	16,235	717,248	853,150	700,669
Spain	15,595	7,264	760	990
Portugal	4,686	27,674	22,430	16,600
Italy	33,500	375,035	355,140	401,315
Other	142,692	1,569,675	1,069,744	1,298,457
Total Europe	889,964	4,804,563	4,822,307	5,039,813

Continued -

CIGARETTES: Exports by country of destination during 1952 with comparisons
(Continued)

Continent and Country	Averages		1951	1952 ^{1/}
	1934-38	1948-52		
	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces
ASIA:				
Iraq	648	1,176	-	-
Palestine & Trans-Jordan	2,373	26,848	20,660	13,540
French Indochina	15,148	10,104	3,100	5,600
Netherlands Indies	15,844	68,693	52,888	61,600
Philippines, Republic of	2,543,597	4,486,121	1,214,240	692,837
China	84,233	2,276	-	-
Hong Kong	22,159	952,420	1,199,096	709,512
British Malaya	2,554	475,709	1,154,295	639,268
Other	45,684	569,311	601,328	755,399
Total Asia	2,732,240	6,592,658	4,245,607	2,877,756
OCEANIA:				
Australia	19,011	2,907	1,986	8,820
New Zealand	17,589	4,628	4,910	3,160
French Oceania	23,429	-	-	-
French Pacific Islands	-	37,124	33,020	45,480
Other	730	9,875	7,460	26,756
Total Oceania	60,759	54,534	47,376	84,216
AFRICA:				
Algeria	(	1,310	540	560
Tunisia	(	15,120	4,050	6,000
Canary Islands		37,572	42,413	29,970
Union of South Africa		3,475	38,511	3,230
Egypt		33,847	111,487	98,820
Belgian Congo		522	173,782	186,958
Tangiers		-	1,468,720	1,757,410
Other		57,531	386,642	456,701
Total Africa		148,067	2,226,915	2,539,629
Total Quantity		4,773,666	18,436,469	16,807,805
Total value, 1,000 dollars		9,058	54,730	53,436

^{1/} Preliminary.

UNITED STATES: Exports of cigars and cheroots, calendar year 1952
with comparisons

Continent and Country	Averages		1951	1952 ^{1/}
	1934-38	1943-52		
	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces
NORTH AMERICA:				
Iceland	3	1	-	5
Panama Republic	1,111	502	290	538
Panama Canal Zone	-	899	664	926
Bermuda	25	70	3	-
Other countries	444	298	200	212
Total North America	1,583	1,770	1,157	1,711
SOUTH AMERICA:				
Total South America	169	73	63	105
EUROPE:				
Germany	182	1,245	22	-
United Kingdom	2,176	16	13	2
Spain	1	1	-	1
Italy	2,514	4	2	-
Other countries	367	274	138	309
Total Europe	5,240	1,540	175	312
ASIA:				
Total Asia	219	1,078	755	590
OCEANIA:				
Total Oceania	321	10	-	33
AFRICA:				
Egypt	67	23	32	8
Union of South Africa	553	502	1,079	430
Other Countries	49	115	111	84
Total Africa	669	640	1,252	522
Total Quantity	8,201	5,111	3,402	3,273
Total value, 1,000 dollars	435	353	194	177

^{1/} Preliminary.

Compiled in Foreign Agricultural Service from records of the Bureau of the Census.

UNITED STATES: Exports of chewing, plug and other tobacco
calendar year 1952 with comparisons 2/

Country	Averages		1951	1952 <u>1/</u>
	1934-38	1948-52		
	<u>1,000</u> <u>pounds</u>	<u>1,000</u> <u>pounds</u>	<u>1,000</u> <u>pounds</u>	<u>1,000</u> <u>pounds</u>
Canada	201	59	29	28
Panama	141	139	139	119
United Kingdom	147	38	22	29
Philippines, Republic of	609	833	538	788
Australia	516	732	504	840
Other countries	173	341	142	116
Total quantity	1,787	2,142	1,374	1,920
Total value, 1,000 dollars	708	1,434	1,070	1,547

UNITED STATES: Exports of smoking tobacco, calendar year 1952 with
comparisons 3/

Country	Averages		1951	1952 <u>1/</u>
	1934-38	1948-52		
	<u>1,000</u> <u>pounds</u>	<u>1,000</u> <u>pounds</u>	<u>1,000</u> <u>pounds</u>	<u>1,000</u> <u>pounds</u>
Canada	132	253	257	237
Argentina	268	146	165	-
United Kingdom	102	14	21	15
Philippines, Republic of	64	243	303	585
Other countries	401	1,688	1,807	2,027
Total quantity	967	2,344	2,553	2,864
Total value, 1,000 dollars	601	1,921	2,019	2,455

1/ Preliminary. 2/ Snuff included 1948 on. 3/ Includes smoking tobacco in packages, in bulk, especially prepared cigarette tobacco.

Compiled in Foreign Agricultural Service from records of the Bureau of the Census.



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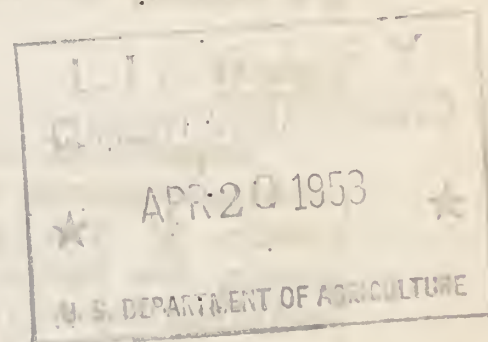
FT 8-53

April 15, 1953

FOREIGN MARKET NOTES---TOBACCO

The Tobacco Situation in Tunisia 1/

By George W. Van Dyne
Marketing Specialist



All phases of the tobacco industry in Tunisia are controlled by the Tunisia Tobacco Monopoly (Regie Tunisienne). Production of leaf tobacco in 1952 was more than double prewar. Imports of leaf tobacco during 1952 were about 25 percent greater than the prewar level. Factory output of tobacco products, especially cigarettes, increased steadily during the postwar period. Exports of leaf and products since 1949 have been encouraging. Total stocks of leaf tobacco at the end of December 1952 were greater than at the corresponding date in 1951.

Production

Tunisia's production of leaf tobacco during 1952 was reported at the record figure of 2.7 million pounds (farm weight). The crop was harvested from about 2,500 acres, by 9,000 growers who received the equivalent of US\$1,822,855 for their tobacco. 2/ Prewar (1935-39) annual production was only 1.2 million pounds from an average of 1,021 acres. Plans for 1953 are for an expansion of about 10 percent in planted area and an increase of 10 percent in price to growers.

1/ Part of a continuing study of foreign market outlets and competition with United States tobacco being conducted by Mr. Van Dyne, under the provisions of the Agricultural Marketing Act. Mr. Van Dyne is stationed in Paris, France, to report on tobacco markets in Western Europe and the Mediterranean area. He acknowledges the help given him by the tobacco trade, and members of the staff of the United States Consulate General at Tunis.

2/ Source: Regie Tunisienne.

Note: Rate of exchange: T. francs 350=US\$1.00.

The bulk of the tobacco grown in Tunisia is a type of Nicotiana tabacum called Arbi. Arbi is grown principally in Sedjenane in the districts of Ain Diahm, Tabarka, and Merjerda and is used mainly for cigarettes and smoking tobacco. The other important tobacco is Souffi, of the Nicotiana rustica species. Souffi is grown in the oasis of Gabes and in the district of Cape Bon and is used almost exclusively for snuff. Arbi seedlings are cultivated mid-January to mid-February and transplanted in May for harvesting July-August. Souffi seedlings are cultivated November-December and transplanted January-February for harvesting May-June. Harvesting is accomplished by the priming method for Arbi and stalk-cutting method for Souffi. All plants are topped, and both types are air-cured and fermented.

Imports

Imports of leaf tobacco into Tunisia during 1952 totaled 4.9 million pounds, compared with an annual prewar (1935-39) average of about 3.9 million pounds. ^{3/} The principal suppliers of leaf in 1952 were Algeria 1.9 million pounds, the United States 0.7 million, Brazil 0.6 million, Turkey 0.4 million, Dominican Republic 0.4 million, Angola 0.3 million, and Greece 0.2 million. Imports from Latin-American countries and Algeria are going ahead at the expense of leaf from the United States and Oriental-type producing countries.

Tunisia's imports of tobacco products have never been large, and are decreasing. During 1952 imports of tobacco products totaled 121,584 pounds, of which France supplied 66,138 pounds, the United States 19,400 pounds, Algeria 17,196 pounds, and the United Kingdom 12,125 pounds. About 90 percent of the tobacco products imported were cigarettes, the remainder being mainly cigars from the Netherlands.

Stocks

Stocks of leaf tobacco on December 31, 1952, totaled 8.9 million pounds, including 1.1 million pounds of United States leaf, which is approximately one year's supply. The United States leaf was made up principally of 0.4 million pounds of Kentucky dark-fired, 0.3 million pounds of Maryland, 0.2 million pounds of Burley, nearly 0.1 million pounds of Virginia flue-cured, and nearly 0.1 million pounds of One Sucker. The remainder was chiefly cigar leaf. Because of the shortage of dollar exchange, the initial high cost of United States leaf, and the exorbitant premiums required for the purchase of United States dollars, the Monopoly restricted imports of United States leaf in 1952 to about 75 percent of the quantity it originally planned to import. Furthermore, it feared that it would have to make a similar reduction in its 1953 purchases for the same reasons.

Domestic Manufacture

The center of the tobacco manufacturing industry in Tunisia is at Tunis, the capital and chief port. There, products manufactured by the 600 employees of the mechanized, well-operated plant include cigarettes, pipe smoking mixtures, cigars, chewing tobacco, and snuff. The output of manufactured

^{3/} Source: Tunisia Tobacco Regie.

products, which averaged about 4.9 million pounds per year during World War II, averaged over 5.7 million pounds for the 3 years ended December 1952. About 80 percent of the factory output is now cigarettes, about 16 percent snuff tobacco, and the bulk of the remainder cut tobacco. The outlook for the manufacture and sale of tobacco products, particularly cigarettes, is favorable. Domestic cigarettes include well-made United States blended and Virginia types that sell at 28 U.S. cents per packed of 20, compared with 43 U.S. cents for imported standard United States or English brands, with the exception of United States blended-type Raleigh cigarettes made in England that sell at 26 U.S. cents per pack of 20.

Exports

Exports of leaf tobacco and tobacco products from Tunisia have not yet been fully developed. However, trial shipments of snuff tobacco leaf in 1950 totaled over 2.9 million pounds, and substantial repeat orders have been received. Furthermore, tobacco products, particularly cigarettes, were shipped to several countries in 1950, and since then encouraging orders for these products have also been received.



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FOREIGN MARKET NOTES--TOBACCO

The Tobacco Situation in Algeria 1/

By George W. Van Dyne
Marketing Specialist

During recent years Algeria has been either the second or third largest producer of leaf tobacco in Africa. In 1952 Algeria's production totaled 45.2 million pounds, nearly one-half of which was exported. Imports of leaf in 1952 were approximately 9.7 million pounds, about 20 percent more than the 1935-39 average. Total leaf utilized in domestic manufacture for 12 months ending June 30, 1952, was 18.9 million pounds ^{2/} compared with about 15.4 million pounds prewar. Usage of United States leaf tobacco, however, was only 0.8 million pounds, which was slightly less than the average during prewar years. The trade state that if dollar exchange were available a minimum of 2.2 million pounds of United States leaf and about 60 million United States blended-type cigarettes would be imported annually provided costs were competitive with somewhat similar leaf and cigarettes.

Production

Algeria's 1952 tobacco production is estimated at 45.2 million pounds, harvested from about 67,607 acres by 21,000 growers who received the equivalent of approximately \$9,370,960 for their crops. ^{3/} This compares with 41.0 million pounds produced in 1951 and a prewar average of 38.5 million pounds. The all-time record was established in 1925 when 65.7 million pounds

^{1/} Part of a continuing study of foreign market outlets and competition with United States tobacco being conducted by Mr. Van Dyne, under the provisions of the Agricultural Marketing Act. Mr. Van Dyne is stationed in Paris, France, to report on tobacco markets in Western Europe and the Mediterranean area. He acknowledges the help given him by the tobacco trade, Algerian Government officials, and members of the staff of the United States Consulate General at Algiers.

^{2/} Source: Tobacco Manufacturer's Trade Association, Algiers.

^{3/} Source: Directorate of Agriculture, Algiers.

Note: Rate of exchange: A. francs 350=US\$1.00.

were produced from 80,673 acres by 21,760 growers. Plans are for a slightly larger crop in 1953 than in 1952, and for a moderate increase in prices.

Practically all of Algeria's leaf tobacco is the Nicotiana species and it is grown without irrigation in the Departments of Algiers, Oran, and Constantine. Three producer cooperative marketing organizations, each with headquarters and manipulation plants at the most important growing centers, control production and sales of domestic leaf. About half the crop is grown in the district of Bone in the Department of Constantine and is sun-cured for use principally in the manufacture of cigarettes and pipe tobacco. The bulk of the remainder is heavier, darker leaf, which is produced in the Kabylia and Mitidja districts in the Department of Algiers, where it is air-cured. Leaf from these two districts is used for blending purposes in all tobacco products, except cigars and snuff. Rustica is produced chiefly in the Departments of Constantine and Oran and is used mainly for the manufacture of snuff and chewing tobacco. Cigar leaf is imported. Seedbeds generally are sown and cultivated December-January for transplanting March-May and harvesting July-September. Harvesting is accomplished by the priming method. None of the leaf grown in Algeria is competitive with United States leaf, and because of climatic and soil conditions it is not likely that any United States tobacco types will be successfully produced in Algeria in the future.

Imports

Imports of leaf tobacco during 1952 totaled 9.7 million pounds compared with 9.5 million pounds in 1951 and a prewar average of 8.0 million pounds. In 1952 nearly two-thirds of the leaf originated in Latin American countries, mainly Brazil, Dominican Republic, and Paraguay, and most of it was used in the manufacture of dark cigarettes and smoking mixtures. Small quantities of cigar leaf were imported from Indonesia, Colombia, Puerto Rico, and the United States. Total imports of leaf from the United States declined from 1.6 million pounds in 1950 to 1.5 million pounds in 1951, and 1.1 million pounds in 1952. However, there is an increasing potential demand for United States leaf, particularly flue-cured and Burley.

Algeria's imports of tobacco products--cigarettes, smoking tobacco, and cigars--come principally from Europe. The bulk of the cigarettes are United States blended types, but several brands are bright Virginia. Unless manufacturers in Algeria can obtain sufficient United States leaf to make similar cigarettes, imports from Europe will continue and probably increase.

Imports of cigarettes increased from 33,289 pounds in 1951 to 93,696 pounds in 1952. Last year Switzerland shipped 49,162 pounds, the Netherlands 25,132 pounds, Belgium-Luxemburg 14,770 pounds, the United Kingdom 3,527 pounds, and the United States 1,102 pounds. Imports of smoking tobacco increased from 6,172 pounds in 1951 to 22,266 pounds in 1952, when the Netherlands supplied 20,723 pounds and Switzerland 1,543 pounds. Cigars increased from 93,300 pieces in 1951 to 427,400 pieces in 1952. The Netherlands and Belgium-luxemburg each shipped about 187,000 pieces and Switzerland 50,000.

Domestic Manufacture

Algiers, the capital and principal port, is the center of Algeria's tobacco manufacturing industry. There are, however, important factories at the ports of Oran, Mostaganem, and Bougie. The factories are mechanized and well operated and employ about 2,000 persons. Products made include an attractive range of cigarettes and cigars; also smoking mixtures, chewing tobacco, and snuff. During 1952 factory output for domestic consumption totaled 13.4 million pounds, compared with 12.7 million pounds in 1951 and a prewar average of about 9.4 million pounds. 4/ In 1952 cigarettes composed about two-thirds of the total output for home consumption compared with approximately one-half during prewar years. The bulk of the cigarettes were made of about 50 percent domestic leaf blended with nearly 47 percent of leaf from Latin America. Most of the remainder were United States blended-type cigarettes. Smoking mixtures, chiefly for "roll-your-own" type cigarettes, totaled 2.2 million pounds in 1952, compared with 2.1 million pounds in 1951. These mixtures were made of approximately 60 percent domestic leaf and nearly 40 percent imported leaf, principally from Latin America. The output of snuff for local consumption increased from a prewar level of about 0.4 million to 1.2 million pounds in 1951, and 1.3 million pounds in 1952. Chewing tobacco increased from a prewar average of about 0.6 million to 1.1 million pounds in 1952. Snuff and chewing tobacco were made entirely of domestic leaf. The output of cigars declined from a prewar level of about 0.2 million to around 0.1 million pounds in 1952. The cigars were made of leaf imported principally from Latin America, Indonesia, and the United States. Prices per cigar to the consumer ranged from 3.4 U.S. cents for the most popular brands to 12.9 U.S. cents for the most expensive.

Only increased taxation or a rise in landed costs can prevent a continued increase in the consumption of cigarettes in Algeria. The most popular domestic cigarettes today are the dark air-cured type, for which the consumer pays 13.1 U.S. cents per pack of 20 pieces. However, the trend is definitely towards United States blended-type cigarettes. Popular brands of these cigarettes smoked in Algeria are manufactured in Switzerland and the Netherlands. They sell to the consumer at 16.9 U.S. cents per pack of 20, compared with 57.1 U.S. cents per pack of 20 for standard United States cigarettes such as Lucky Strike or Chesterfield. English-made proprietary brands of Virginia cigarettes such as Craven "A" sell at 57.1 U.S. cents per pack of 20, but Players N/C Medium and Players Virginia No. 6 filter-tip cigarettes made in Switzerland sell at 54.3 U.S. cents per pack of 20 cigarettes. Unless we can get the prices of United States leaf and products down to a more competitive basis we will miss this market.

Exports

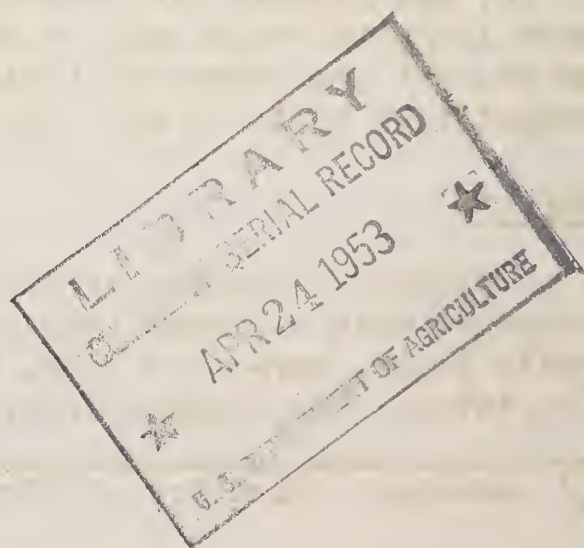
Algeria's exports of leaf tobacco during 1952 were 23.7 million pounds compared with a prewar average of 26.5 million pounds. Shipments, principally light, sun-cured leaf, to France and French colonies composed most of the total. The producer cooperatives' 10-year sales arrangement with the

4/ Sources: Ministry of Finance and tobacco trade, Algiers.

French Tobacco Regie made in 1949 still obtains, and exports of leaf tobacco are therefore expected to remain around the current level. In addition to leaf, Algeria exports tobacco products, principally cigarettes and smoking mixtures, mainly to the French colonies. During 1951 and 1952 exports of tobacco products averaged about 12.3 million pounds annually compared with a prewar average of 6.5 million pounds. The increase in this trade is expected to be maintained provided costs are not increased materially.

Stocks of Leaf

Stocks of leaf tobacco, other than United States types, are estimated to be about one and one-half years duration. Because of the initial high cost of United States leaf and the exorbitant premiums, often as high as 25 percent, required for the purchase of United States dollars, stocks of United States leaf are down to a hand-to-mouth basis.





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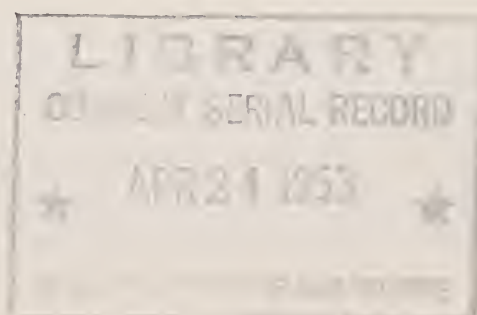
FOREIGN MARKET NOTES--TOBACCO

The following information has been received from George W. Thomas, Jr., Foreign Agricultural Service, who is making a survey of marketing possibilities for United States tobacco in Asia. Mr. Thomas is at present in Manila, Philippine Islands.

"Monopoly* Taipei (Taiwan) requested dollar exchange for 850,000 pounds, United States tobacco. Expressed desire making purchase prior June 1."

The United States exported 958,000 pounds of un-manufactured tobacco to Taiwan during 1952, compared with 1,311,000 pounds in 1951.

* "Monopoly" refers to Taiwan Tobacco and Liquor Monopoly Bureau, which exercises control over the tobacco industry in Taiwan.





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FOREIGN MARKET NOTES--TOBACCO

The Tobacco Situation in the United Kingdom of Libya 1/

By George W. Van Dyne
Marketing Specialist

In the United Kingdom of Libya all phases of the tobacco industry are controlled by the State Tobacco Monopoly. During 1952 the industry successfully completed its first calendar year's operations since the formation of the Kingdom on December 24, 1951. The outlook appears bright. Leaf production totaled 1.0 million pounds, farm weight, harvested from 1,050 acres by 795 growers who received US\$139,674 for their crops. Factory output was also encouraging, and about 0.9 million pounds of tobacco products were manufactured by 658 employees. Consumption of tobacco products in all categories went ahead steadily, which indicates an increasing potential market for United States leaf tobacco. There were no exports of leaf or tobacco products.

The new Kingdom has a population of about 1,200,000 and is composed of three Provinces--Tripolitania, the Fezzan and Cyrenaica. It covers an area of approximately 680,000 square miles (over 90 percent of which is desert), lying between the Mediterranean on the North and French Equatorial and West Africa on the South, with Egypt on the East and Tunisia and southern Algeria on the West.

By far the most important species of tobacco produced is Nicotiana tabacum but important quantities of Nicotiana rustica are also grown. Of the former, Perustitza, light oriental, Burley, light air-cured, and Salento (dark Italian), are the most popular types, while Fezzani, a strong indigenous tombac-like leaf makes up practically all of the latter. Perustitza seedbeds are sown

1/ Part of a continuing study of foreign market outlets and competition with United States tobacco being conducted by Mr. Van Dyne, under the provisions of the Agricultural Marketing Act. Mr. Van Dyne is stationed in Paris, France, to report on tobacco markets in Western Europe and the Mediterranean area. He acknowledges the help given him by the tobacco trade, government officials of the United Kingdom of Libya, and members of the staff of the United States Legation at Tripoli.

November-December for transplanting March-April, and harvesting in July. Seedbeds for the other types are sown January-February for transplanting around the last of April and harvesting July-September. Harvesting is accomplished by the priming method for all types except Salento, which is stalk cut. The major portion of the crop is sun-cured, either while the leaves are strung on frames or spread on the desert sands. However, important lots of leaf are strung and air-cured in barns. Smaller quantities are silo-cured, during which process the entire plant is hung.

From July to December, growers bring their leaf in "green form" to the Monopoly's buying depots. There, the Monopoly buyers grade the tobacco and prepare it for shipment to the Monopoly's warehouses for manipulation and storage.

The Monopoly plans to double the 1952 leaf production for 1953. Licenses to growers have been increased from 795 issued in 1952 to 1,500 in 1953. The planted area will be increased from 1,050 acres to 2,224 acres. Production is expected to reach 2.1 million pounds, compared with 1.0 million pounds in 1951. Prices per kilo to be paid growers will range from 11 to 19 U.S. cents for Perustitza, 1 to 15 U.S. cents for Salento, and 8 to 14 U.S. cents for Fezzani.

Imports of leaf and tobacco products are restricted because of the shortage of exchange and the Government's policy of striving for self-sufficiency as regards its tobacco requirements. However, during 1952 about 32,018 pounds of cigarettes were imported, practically all from the United Kingdom. The bulk of these were English-made straight Virginia-type cigarettes such as State Express 555, Players, and Craven "A", but English-made United States blended-type cigarettes, such as Raleigh and Astoria were also imported. Until the Monopoly commences the manufacture of similar cigarettes these imports will continue and probably increase.

In addition to the production of leaf tobacco, the new Kingdom's tobacco industry includes the manufacture of cigarettes, chewing tobacco, tobacco for roll-your-own type of cigarettes and pipe smoking, cigars, and snuff. The Monopoly's factory is located at Tripoli, the capital and principal port. The factory is mechanized, and very efficiently operated. Production is estimated to have increased from about 0.8 million pounds in 1951 to 0.9 in 1952. Approximately 70 percent of the output was cigarettes; nearly 29 percent chewing and cut tobacco; and the remainder cigars and snuff. About two-thirds of the cigarettes are the strong, dark type, and the bulk of the remainder are oriental.

Prices of domestic cigarettes ranged from the very low figure of 3 U.S. cents for a packet of dark cigarettes 2/ to 15 U.S. cents for 20 attractively packaged, nicely blended oriental-type cigarettes. Slightly over 50 percent of the total sales of domestic cigarettes are made at the price of 9 U.S. cents for a packet of 20 cigarettes. Prices for a pack of 20 proprietary English-made Virginia brands range from 28 U.S. cents for Players N/C Medium or

2/ These cheap cigarettes weigh 1,052 grams per thousand.

Craven "A" to 34 U.S. cents for State Express 555 or Players No. 3. English-made United States blended-type cigarettes such as Raleigh and Astoria sell at 25 U.S. cents for a pack of 20. There is a small black market in standard United States blended-type cigarettes, but the price differential is so great that this trade is not regarded seriously by the authorities in Tripoli. Toscani-type cigars, made locally, sell at 2 U.S. cents each. Light, domestic, air-cured cut tobacco, principally for roll-your-own cigarettes, sells at 11 U.S. cents per 40-gram packet. Tombac, indigenous cut tobacco, sells at 6 U.S. cents per 40-gram packet. Locally made chewing tobacco sells at 2 U.S. cents per 22-gram packet, and snuff at 11 U.S. cents per 25-gram packet.

The outlook for the tobacco industry in the United Kingdom of Libya is good because the smoking population in the large centers is increasing with the rise in employment and wages. Economic conditions in many of the villages are improving, and with the expansion in the distributing facilities of the Tobacco Monopoly its products will be available to more people in the outlying districts. There is an increasing potential market for United States leaf, but price and exchange factors will be particularly important.



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CIGARETTE TOBACCO SITUATION IN THE PHILIPPINE REPUBLIC

A joint survey of the Virginia flue-cured leaf tobacco situation in the Philippines was made while George W. Thomas, Jr., Marketing Specialist, United States Department of Agriculture, was in the Islands in April. Embassy and Mutual Security Agency staff participated in the survey which indicated that leaf tobacco requirements in 1953 might materially overrun supplies available.

The Philippine Tobacco Flue-Curing and Redrying Corporation estimated that the 1953 crop of Virginia leaf tobacco would be approximately 1.5 million pounds of cured tobacco. Based on observations of the tobacco in some of the fields, estimated yields, planted acres, and the fact that the above Corporation has a very material interest in the production, the estimate seems reasonable. The stocks of the 1952 and earlier years' crops are estimated at 0.5 million pounds, making available a total of 2.0 million pounds of locally grown Virginia tobacco. It is not anticipated that production can be materially increased for the next several years.

Domestically produced Virginia tobacco can be used to some extent in manufacturing cigarettes. The tobacco has good color, but is thin, small and lacks aroma and flavor.

In accordance with the existing import law (Republic Act 698 approved May 9, 1952) only 14.3 million pounds of cigarette tobacco may be imported in 1953. It has been reported that the Import Control Commission proposes to issue licenses for approximately 80 percent of the allowable imports for 1953 prior to June 30, 1953.

According to the Philippine Bureau of Internal Revenue, stocks of United States flue-cured and Burley tobacco, including stocks in factories, warehouses, enroute, and held in the United States (for which licenses of import have been issued and exchange allocated) on January 1, 1953, totaled 13 million pounds.

Estimated availability of leaf tobacco for Virginia type cigarettes, therefore, may be summarized as follows:

Stocks, January 1, 1953	13.0 million pounds		
Local production, 1953, and			
local stocks	2.0	"	"
Imports, 1953	14.3	"	"

Total for 1953 29.3

May 28 1953

The number of Virginia or American blended type cigarettes on which taxes were paid in calendar years 1951, 1952, and an estimate for the current year 1953, together with cigarette leaf tobacco requirements are as follows:

	<u>Number of Cigarettes Million pieces</u>	<u>Tobacco used or Required Million pounds</u>
1951	5,987	19.8
1952	9,160	30.2
1953, estimated	10,800	35.6

The figures on tobacco leaf requirements are based on 3.3 pounds of leaf tobacco per 1,000 cigarettes derived from the Bureau of Internal Revenue data on the number of tax paid cigarettes and the reported usings of tobacco. Production of this type cigarette in 1953 was 18 percent larger than 1952 and 1952 was 53 percent above 1951.

In order to maintain an efficient manufacturing program, including consistency in cigarette quality, the minimum stock requirements for the Philippine tobacco industry is 9 months. The term "stocks" includes materials in factory or warehouse, or those which are under control of the manufacturer, i.e., an import license has been issued and the necessary foreign exchange has been allocated to the purchaser.

Based on the 1953 estimated factory utilization of 35.6 million pounds, the minimum requirements for 9 months' stocks are 26.8 million pounds of leaf tobacco. Total supplies required for 1953, therefore, would seem to be 62.4 million pounds, more than double the supplies which appear to be available. In other words, the Philippine manufacturers will be completely out of cigarette tobacco by November 1, 1953. It should be noted that (1) the stocks are divided among approximately 12 manufacturers; (2) cigarettes are made from a blend of tobaccos, therefore, the grades of tobacco in stocks probably will have to be blended with other grades to produce a cigarette which may be expected to have reasonable consumer acceptance; and (3) it requires a minimum of two months from the date of issuance of an import license until the tobacco is received in a manufacturing plant.

It is estimated that a minimum of \$6,300,000 U.S. of government revenue will be lost, and that employees of the cigarette factories will lose 2 months of employment during calendar year 1953. During calendar year 1954 it is estimated that under present conditions less than one-third of the requirements will be available. Since there are no legislative restrictions upon the imports of manufactured cigarettes, Such imports may increase substantially even though the foreign exchange cost of importing is much greater for cigarettes than for the equivalent amount of leaf tobacco.

A bill has been introduced in the Philippine House of Representatives which would restrict imports of cigarette tobacco even more than does the present law. Officials of the Republic of the Philippines, however, have indicated that they will propose modification of import restrictions of Republic Act 698 in order to assure a sufficient supply of Virginia type leaf tobacco to maintain cigarette production at a level high enough to provide revenue equal to the amount collected from such production in 1952. In the event of such action, the United States should enjoy a sizeable and relatively stable market for cigarette leaf for some time.



FOREIGN AGRICULTURE CIRCULAR

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FOREIGN AGRICULTURAL SERVICE
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April 30, 1953

TOBACCO PRODUCTION BY TYPE IN SPECIFIED COUNTRIES

The tobacco harvest for the 1952-53 production year in a group of countries, mostly in the Southern Hemisphere and which harvest the bulk of their tobacco between December and July totaled 1,880 million pounds from 2,756,000 acres as compared with 1,796 million pounds from 2,729,000 acres in the preceding production year. Production increased 5 percent over the previous year and acreage, only 1 percent. During the prewar years, 1935-39, production in these countries was 2,047 million pounds from 2,764,000 acres. The decrease took place largely in India, Pakistan, and Indonesia. Some minor decreases also occurred in many of the other countries included in this summary. It should be emphasized that the figures are not world totals since they exclude countries which harvest tobacco from August to November and some of these are leading producers.

North America

Tobacco production in the listed North American countries totaled 208.6 million pounds from 288,000 acres as compared with 198.1 million pounds from 297,000 acres in 1951-52. The production of these countries during the prewar years (1935-39) was only 120.3 million pounds from 188,000 acres. Mexico was the largest producing country of the group, with 78.0 million pounds for 1952-53. Cuba, the second largest, is estimated to have harvested 74.7 million pounds for 1952-53. The Dominican Republic, the third largest, is tentatively estimated at 40.0 million pounds.

Asia

The Asiatic countries included in this summary harvested 1,015 million pounds for 1952-53, or 2 percent above the 992 million pounds of tobacco produced in 1951-52. The prewar production in these countries is estimated at 1,535 million pounds. Acreage decreased from 2,088,000 acres in 1935-39 to 1,444,000 in 1952, and 1,466,000 acres in 1953. This decrease from the prewar level is attributed primarily to the large decreases in India, Pakistan, and Indonesia. Increases in Burma and Thailand partially offset these decreases.

South America

- Leaf production in South America in 1952-53 is tentatively estimated at 435 million pounds, or nearly 11 percent above the 393 million in 1951-52 and 44 percent above the 302 million pounds produced in 1935-39. Acreage increased from the 303,000 for the 1935-39 average to 590,000 acres in 1953. Brazil is

expected to produce about 60 percent of the total 1952-53 South American tobacco crop, the same percentage as in 1952, and 67 percent of the 1935-39 average. Argentina's production is expected to account for about 20 percent of the estimated crop, the same percent as in 1951-52, but only 10 percent of the 1935-39 average.

Africa

The listed countries of Africa are the major tobacco producing countries on that continent. They produced 210 million pounds in 1952-53, or 5 percent above the total of 199 million pounds in 1951-52, and 152 percent above the 83 million pounds in 1935-39. Acreage increased from the 1935-39 average of 173,000 to 400,000 in 1952-53. The greatest increase in production occurred in Southern Rhodesia, which increased from 26.1 million pounds in 1935-39 to 108.5 million pounds in 1952-53. However, the Union of South Africa also increased from the prewar average of 24.6 million pounds to 37.2 million in 1953 and Northern Rhodesia from less than 2 million to over 12 million pounds in 1953.

Oceania

The countries listed in this area are Australia and New Zealand. The 1952-53 production is estimated at 12.6 million pounds, 6.8 million of which was produced in Australia and 5.8 million produced in New Zealand. The 1952-53 output is practically twice as large as the prewar annual average but slightly below the 1951-52 output.

Summary of Production for Specified Countries by Types

In this summary an attempt has been made to classify production by types of leaf. In certain countries it has been necessary to arrive at the total production of each type on an estimated percentage basis derived from absolute figures of relatively recent years. In a breakdown using this method the possibility of considerable error exists, inasmuch as the factors of production often differ by type. It will be noted that very few statistics are available for the prewar average by types.

Flue-cured data on acreage, yield, and production of flue-cured tobacco has been collected and published currently in the past; consequently, more information is available and for many countries it is considered reasonably reliable. For the other types, the possibility of error is much greater, not only from the standpoint of adequate and current reporting but also because of the variation of classification in different regions. Flue-cured production in the specified countries for 1952-53 is estimated at 358.1 million pounds as compared with 322.1 million pounds in 1951-52. Southern Rhodesia leads in the production, followed by Brazil and Thailand. Since the demand for flue-cured leaf in cigarette manufacture has been increasing in many foreign countries, much effort is being exerted to increase flue-cured output and also to improve the quality of leaf.

Burley leaf production for the countries included in this summary is estimated at only 14.2 million pounds in 1952-53, or 75 percent above the 8.1 million produced in 1951-52. This large increase is primarily attributed to Brazil's production of 4.3 million pounds in 1952-53 as compared with none in 1951-52. However, some Burley may have been grown in 1951-52 and not reported. Slight increases in Burley output also occurred in a number of the included countries.

Light Air-cured: The 1952-53 production of this type is estimated at 43.0 million pounds, 48 percent of which was produced in Argentina, slightly over 27 percent in Paraguay, and 15 percent in Madagascar. The 1951-52 crop is estimated at 40.3 million pounds, the bulk of which was grown in the same countries.

Dark Air-cured tobacco is the predominant type harvested during this half-year period. Production in the countries included in this summary is estimated at 1,313 million pounds in 1952-53 compared with 1,289 million in 1951-2. Practically every country included in this study produces some dark air-cured type leaf and puts this type to various uses peculiar to the area in which produced. Some use this type in cigarettes, cigars, and cheroots, while others also use it for chewing and snuff. India is the largest producer in this particular list of countries, followed by Brazil, Pakistan, and Burma, in the order named.

Sun-cured leaf production is limited to a few countries. The total 1952-53 production is estimated at 122.2 million pounds as compared to 111.0 million in 1951-52. India is the largest sun-cured producer. Mexico ranks second, and Thailand, third.

Fire-cured leaf is reportedly grown only in 4 of these countries and total 1952-53 production is estimated tentatively at 27.8 million pounds, of which Nyasaland produced 22.4 million pounds.

Turkish Type: Only three of the listed countries, all of which are in Africa, reported production of Turkish type. These three, namely, Southern Rhodesia, Northern Rhodesia, and the Union of South Africa are expected to produce 1.7 million pounds during 1952-53 as compared with 1.3 million pounds in 1951-52.

TOBACCO: Acreage, yield per acre, and production in specified countries, 1/ average 1935-39, annual 1952 and 1953

Continent and Country	Acreage Harvested		Yield per Acre 2/		Production	
	Average 1935-39	1952	Average 1935-39	1952	Average 1935-39	1952
	1,000 acres	1,000 acres	Pounds	Pounds	1,000 pounds	1,000 pounds
NORTH AMERICA:						
Costa Rica	-	3	-	700	700	1,984
El Salvador	-	2	-	600	600	1,200
Guatemala	5	7	376	599	594	4,219
Honduras	-	10	-	500	509	7,250
Mexico	51	89	840	755	987	67,240
Nicaragua	-	1	-	892	900	581
Cuba	107	144	447	542	550	78,000
Dominican Republic	25	41	985	957	889	39,682
Total for countries shown	188	297	-	-	-	198,111
ASIA:						
Burma	-	-	-	-	-	-
Ceylon	108	137	726	780	747	107,000
French Indochina	14	12	650	707	710	8,000
India	44	25	728	572	667	14,300
Pakistan 5/	917	764	831	660	677	504,000
Indonesia:	355	168	913	880	882	147,840
Java and Madura:	-	-	-	-	-	-
Estate	69	30	976	900	950	27,523
Native	349	100	402	570	570	57,362
Suatra:	-	-	-	-	-	-
Estate (Deli)	31	6	988	1,100	955	6,614
Native (Kerf)	-	18	-	1,100	950	19,935
Philippine Republic	176	82	427	726	723	59,524
Thailand	25	102	688	400	400	40,000
Total for countries shown	2,088	1,444	-	-	-	992,098
SOUTH AMERICA:						
Argentina	34	92	928	837	928	77,381
Brazil	237	388	851	609	642	236,053
Chile	9	8	1,846	1,685	1,702	13,428
Colombia	-	51	-	880	892	44,973
Paraguay	22	18	808	490	908	8,818
Uruguay	1	1	1,200	1,244	977	741
Venezuela	-	16	-	722	844	11,613
Total for countries shown	393	574	-	-	-	393,007
AFRICA:						
Nyasaland	57	85	286	315	385	26,800
Tanganyika	-	-	-	-	-	-
Madagascar	19	13	764	669	370	5,568
Mozambique	1	3	385	450	500	8,818
Nigeria	-	-	-	-	-	-
Northern Rhodesia	4	27	486	472	455	3,704
Southern Rhodesia	51	194	507	597	600	12,250
Union of South Africa	41	30	500	535	437	97,500
Total for countries shown	173	402	-	-	-	42,805
OCEANIA:						
Australia	10	8	532	932	904	199,423
New Zealand	2	4	787	1,616	1,642	83,231
Total for countries shown	12	12	-	-	-	2,047,082
Total for all countries shown	2,764	2,729	-	-	-	1,796,138

1/ Most of these countries lie within the Southern Hemisphere, with the majority of the harvests occurring between December and July of the year shown.

2/ Yields are calculated from detailed acreage and production estimates rather than estimates rounded to the nearest thousand.

3/ Preliminary.

4/ Less than a 5-year average.

FLUE-CURED TOBACCO: Estimated acreage, yield and production in specified countries 1/
1953 with comparisons

Continent and Country	Acreage Harvested		Yield per Acre 2/		Production	
	:		:		:	
	Average 1935-39	1953 3/	Average 1935-39	1952	Average 1935-39	1952 2/
	acres	acres	Pounds	Pounds	pounds	pounds
NORTH AMERICA:						
Costa Rica	-	4/	-	310	-	143
El Salvador	-	1	-	600	-	1,500
Guatemala	4/	1	376	780	132	304
Honduras	-	1	-	349	-	250
Mexico	-	6	-	759	800 5/	4,299
Nicaragua	-	1	-	892	-	600
ASIA:						
Burma	-	1	-	746	-	784
Ceylon	-	3	-	500	-	2,000
Indochina	-	-	-	-	-	550
India	67	195	466	462	31,280	80,000
Pakistan	-	5	-	888	-	4,500
Indonesia	-	20	-	334	-	8,818
Philippine Republic	-	6	-	550	-	5,512
Thailand	-	58	-	285	-	17,637
SOUTH AMERICA:						
Argentina	5/	14	900	862	918 5/	13,000
Brazil	-	32	-	824	-	58,697
Chile	-	1	-	1,343	-	683
Venezuela	-	6	-	892	-	6,367
AFRICA:						
Nyasaland	-	-	-	-	2,574	3,583
Tanganyika	-	-	-	-	-	3,000
Nigeria	-	-	-	-	-	600
Northern Rhodesia	-	-	-	-	-	11,500
Southern Rhodesia	48	193	513	500	24,623	108,000
Union of South Africa	-	-	-	-	-	-
Amarillo	-	-	-	-	-	-
Orinoca	-	-	-	-	4,996	12,074
Mozambique	-	-	-	-	-	1,200
OCEANIA:						
Australia	10	8	532	932	5,276	6,894
New Zealand	2	4	700	1,616	1,428	5,600
Total, Countries shown	-	-	-	-	-	358,095

See footnotes at end of circular.

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See footnotes at end of circular.

DARK AIR-CURED TOBACCO: Estimated acreage, yield and production in specified countries: 1/
1953 with comparisons

Continent and Country	Acreage Harvested		Yield per Acre 2/		Production	
	Average		Average		Average	
	1935-39	1952	1935-39	1952	1935-39	1952
	1,000 acres	1,000 acres	Pounds	Pounds	1,000 pounds	1,000 pounds
NORTH AMERICA:						
Guatemala	5	6	376	580	1,760	3,651
Honduras	-	-	-	-	-	-
Copan	-	9	-	550	-	5,000
Mexico	-	45	-	593	-	26,897
Cuba - Cigar	-	-	-	-	-	-
Sun and shade grown	107	144	447	542	50,833	78,000
Dominican Republic	-	-	-	-	-	-
Criollo	-	-	-	-	-	-
Orlo	25	41	985	967	24,265	39,682
ASIA:						
Burma	-	136	-	782	-	106,552
Ceylon	-	9	-	722	-	6,500
Indochina	-	-	-	-	-	13,638
India	-	469	-	775	-	364,200
Pakistan	-	163	-	882	-	143,840
Indonesia	-	-	-	-	-	-
Java and Madura	-	-	-	-	-	-
Estate	-	-	-	-	-	21,438
Native	-	-	-	-	-	57,362
Sumatra	-	-	-	-	-	-
Estate - Deli	-	-	-	-	-	6,085
Native - Kerf	-	-	-	-	-	19,935
Philippine Republic	-	-	-	-	-	56,217
SOUTH AMERICA:						
Argentina	-	52	-	860	-	45,000
Brazil	-	-	-	-	-	-
Air	-	115	-	849	-	97,554
Twist	-	240	-	466	-	112,044
Chile	-	-	-	-	-	-
Paraguay	-	5	-	1,717	-	9,266
Havana	-	2	-	1,693	-	3,384
Colombia	-	51	-	880	31,167	44,973
Paraguay	-	-	-	-	-	-
Fuerte	6	4	741	550	4,448	2,204
Venezuela	-	6	-	553	-	3,416
Uruguay	8	1	825	1,244	1,254	741
AFRICA:						
Madagascar	-	-	-	-	-	-
Corse	-	-	-	-	-	1,102
Mozambique	5/	1	385	-	467	278
Nigeria	-	-	-	-	-	3,169
Tanganyika	-	-	-	-	-	372
Union of South Africa	-	-	-	-	-	16,928
Total, Countries Shown	-	-	-	-	-	1,289,428
						1,313,239

See footnotes at end of circular.

LIGHT AIR-CURED TOBACCO: Estimated acreage, yield and production in specified countries 1/
1953 with comparisons

Continent and Country	Acreage Harvested		Yield per acre 2/		Production	
	Average 1935-39	1952	Average 1935-39	1952	Average 1935-39	1952
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 pounds	1,000 pounds
NORTH AMERICA:						
El Salvador	-	1	-	600	-	300
SOUTH AMERICA:						
Argentina	-	21	-	820	-	17,400
Paraguay	-	14	-	473	-	6,614
Flojo	16		834		13,344	11,775
AFRICA:						
Madagascar	-	-	-	-	-	7,716
Union of South Africa	-	-	-	-	-	8,220
Total Countries Shown	-	-	-	-	-	40,250
						42,989

See footnotes at end of circular.

SUN-CURED TOBACCO: Estimated acreage, yield and production in specified countries 1/
1953 with comparisons

Continent and Country	Acreage Harvested		Yield per Acre 2/		Production	
	Average 1935-39	1952	Average 1935-39	1952	Average 1935-39	1952
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 pounds	1,000 pounds
NORTH AMERICA:						
Costa Rica	-	2	-	800	-	1,839
Mexico	-	37	-	940	-	35,152
ASIA:						
India	-		-		-	
Natu	-	96	-	500	-	48,000
Thailand	-	46	-	510	-	23,465
AFRICA:						
Nyasaland	-	-	-	-	-	2,500
Total Countries Shown	-	-	-	-	-	110,956
						122,170

See footnotes at end of circular.

FIRE-CURED TOBACCO: Estimated acreage, yield and production in specified countries ^{1/}
1953 with comparisons

Continent and Country	Acreage Harvested		Yield per Acre ^{2/}		Production	
	Average : 1935-39	1952 : 1953 ^{3/}	Average : 1935-39	1952 : 1953 ^{2/}	Average : 1935-39	1952 : 1953 ^{3/}
	1,000 : acres	1,000 : acres	Pounds : Pounds	Pounds : Pounds	1,000 : pounds	1,000 : pounds
SOUTH AMERICA:						
Argentina	-	2	-	1,300	-	2,307
AFRICA:						
Tanganyika	-	-	-	-	-	2,231
Southern Rhodesia	-	1	-	400	-	715
Nyasaland	-	-	-	-	-	18,800
Total, Countries Shown	-	-	-	-	-	24,053
						27,849

See footnotes at end of circular.

TURKISH TOBACCO: Estimated acreage, yield per acre, and production in specified countries ^{1/}
1953 with comparisons

Continent and Country	Acreage Harvested		Yield per Acre ^{2/}		Production	
	Average : 1935-39	1952 : 1953 ^{3/}	Average : 1935-39	1952 : 1953 ^{2/}	Average : 1935-39	1952 : 1953 ^{3/}
	1,000 : acres	1,000 : acres	Pounds : Pounds	Pounds : Pounds	1,000 : pounds	1,000 : pounds
AFRICA:						
Northern Rhodesia	-	-	-	-	-	100
Southern Rhodesia	-	-	-	-	-	285
Union of South Africa	-	-	-	-	-	935
Total, Countries Shown	-	-	-	-	-	1,320
						1,700

- ^{1/} Most of these countries lie within the Southern Hemisphere, with the majority of the harvests occurring between December and July of the year shown.
- ^{2/} Yields are calculated from detailed acreage and production estimates rather than estimates rounded to the nearest thousand.
- ^{3/} Preliminary.
- ^{4/} Less than 500.
- ^{5/} Less than a 5-year average.

Foreign Agricultural Service. Official estimates of foreign countries, reports from U. S. Foreign Service Officers, results of office research and other information.





FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT 14-53

May 7, 1953

THE TOBACCO SITUATION IN STERLING AREA COUNTRIES

Tobacco production, exports, total imports, and imports from other sterling areas, have increased substantially in postwar years as compared with prewar years (1935-39) in the sterling area. For this particular survey, the sterling area is described as a group of British Commonwealth countries which for particular economic purposes banded together at the beginning of World War II. Most British Commonwealth countries have at some time or another belonged to the sterling area and have dropped out, therefore, this survey includes only the most important tobacco producing and consuming countries as they relate to the world tobacco situation and affect United States unmanufactured tobacco exports.

Estimated tobacco production in the sterling area for the 1952-53 crop year (excluding Canada which is included in this particular survey but it not considered one of the sterling area countries because of the close relation to the United States) is tentatively estimated at 1,013 million pounds, or 4 percent above the 970 million pound average produced in 1935-39. The significant increases in production occurred in Southern Rhodesia, Northern Rhodesia, Union of South Africa, and Nyasaland, all of which are important sources of unmanufactured tobacco for the United Kingdom. Canada's production has increased to 135.4 million pounds in 1952-53 as compared to only a 76.6 million pound average in 1935-39. India and Pakistan combined decreased about 86 million pounds, which practically offset the substantial increases in the countries included in this survey.

Flue-cured production in the sterling area, including Canada, increased to 374 million pounds in 1952-53 as compared with a 125 million pound average during the 1935-39 period. This is an increase of nearly 200 percent. Flue-cured production, the most important cigarette type leaf in the sterling area countries, represents about 33 percent of the total tobacco production during 1952-53 as compared with only 12 percent of the total prewar average. Southern Rhodesia expanded production during this period to a greater extent than any other countries shown. However, total production of flue-cured leaf in Canada is greater in 1952, i.e., 135 million pounds for Canada as compared with 108 million for Southern Rhodesia. India's flue-cured production also expanded rapidly to about 80 million pounds in 1952-53, or 158 percent above the 31 million pound annual average produced in 1935-39. Slight increases in flue-cured production are also indicated for the other sterling area countries.

Complete tobacco consumption data for these countries are not available; however, Table 3 contains the data which was obtainable. Total consumption for the available countries (including Canada) totaled 1,091 million pounds in the 1952 calendar year, or 31 percent below the prewar (1935-39) annual average of 1,583 million pounds. This decrease is attributable to India, which decreased to 508 million pounds in 1952 as compared to a 1,100 million pound annual average during 1935-39, a decrease of 592 million pounds. Burma's consumption decreased to 93 million pounds in 1952 as compared to a 110 million pound average for 1935-39. However, consumption increased in the more important importing countries. The United Kingdom increased from a 255 million pound annual prewar average (1935-39) to 280 million pounds in 1952, an increase of 10 percent; Ireland increased from 9.1 million pounds annually for 1935-39 to 16.2 million in 1952, an increase of 78 percent; Australia, from 25.1 million pounds annually during 1935-39 to 29.5 million in 1952; New Zealand's consumption increased from 6.0 million pounds annually during 1935-39 to 10.0 million in 1952. Canada, though not a large leaf tobacco importer, realized a consumption increase from a 46.6 million pound annual prewar average to 86.4 million pounds in 1952.

Exports of unmanufactured tobacco from the important producing countries (including Canada) totaled 250 million pounds, about 135 percent above the total annual exports during the prewar years of 106.1 million pounds. Increased exports from Southern Rhodesia, India, Northern Rhodesia, and Nyasaland accounted for the majority of the increase. Southern Rhodesia exported 90.1 million pounds in 1952 compared with only a 19.2 million pound annual average during 1935-39; India exported 85.0 million pounds in 1952 as compared with a 43.5 million pound prewar average, a 95 percent increase; Nyasaland exported 20.8 million as compared with a 12.8 million pound average for 1935-39. Northern Rhodesia increased to 9.0 million pounds as compared with nearly a 1.5 million pound average for 1935-39.

Imports of unmanufactured tobacco in the specified countries, including Canada, during 1952 were only 311 million pounds as compared with the prewar average of 331 million pounds. However, this decrease is primarily attributed to the decreased takings by the United Kingdom during 1952. In 1951 the imports of these countries totaled 442 million pounds; in 1950 they took 387 million pounds; and the 1945-49 average totaled 417 million pounds, all substantially above the prewar average. Decreased imports of unmanufactured tobacco from sterling area countries into the United Kingdom during 1952 does not reflect the postwar import trend for these countries. Imports from other sterling countries in this survey show that in 1952 almost 109 million pounds were taken, as compared with only a 66 million pound prewar average. The 1952 total is substantially under the 126 million pounds imported in 1951 and the 149 million imported in 1950, due primarily to smaller takings from these sources by the United Kingdom. The United Kingdom and other sterling countries, in order to conserve the already scarce exchange, is turning more and more to non-dollar areas for their supply of unmanufactured tobacco.

By Claude E. Dobbins, Agricultural Economist.

TABLE 1.- Tobacco production in sterling area countries
1952-53 with comparisons

Country	Average		1950-51	1951-52	1952-53 1/
	1935-39	1945-49			
	1,000	1,000	1,000	1,000	1,000
	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>
United Kingdom	-	-	-	-	-
Ireland	-	-	-	-	-
India	2/ 761,000	604,933	551,040	504,000	525,000
Pakistan	-	3/ 324,053	168,040	147,840	150,000
Burma	107,072	90,000	93,600	107,000	100,800
Ceylon	9,000	3/ 2,704	7,450	8,000	8,300
British Malaya	6,900	4,500	4,400	3,300	4,500
Australia	5,276	3,306	4,248	7,603	6,894
New Zealand	1,457	4,527	5,436	5,896	5,750
Union of South Africa	24,593	42,676	51,836	42,805	37,168
Southern Rhodesia	26,061	75,891	88,208	97,500	108,500
Northern Rhodesia	1,635	5,210	10,500	12,750	12,250
Nyasaland	16,311	25,843	31,000	26,800	32,787
Nigeria	3/ 340	2,000	2,019	3,704	4,000
Gold Coast	-	-	-	-	-
Kenya	139	3/ 1,538	845	700	162
Uganda	1,600	2,470	3,450	5,526	2,373
Tanganyika	374	2,800	6,127	4,991	3,280
Iraq	8,057	8,057	13,275	6,614	11,023
Sub-total	969,815	1,200,508	1,041,474	985,029	1,012,787
Canada	76,566	121,373	120,298	153,792	135,400
Total Countries Shown	1,046,381	1,321,881	1,161,772	1,138,821	1,148,187

1/ Preliminary.

2/ Includes Pakistan.

3/ Less than a 5-year average.

Compiled by Foreign Agricultural Service from official estimates of foreign countries, U. S. Foreign Service Reports, and other information.

TABLE 2.- Flue-cured tobacco production in sterling area countries
1952-53 with comparisons

Country	Average		1950-51	1951-52	1952-53 ^{1/}
	1935-39	1945-49			
	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds
India	^{2/} 31,280	74,218	105,600	90,000	80,000
Pakistan	-	972	4,165	4,000	4,500
Southern Rhodesia	24,623	72,785	89,432	96,500	108,000
Northern Rhodesia	-	4,670	10,676	12,500	11,500
Nyasaland	2,574	2,701	4,010	4,000	3,583
Union of South Africa	4,996	20,022	21,442	16,722	12,074
Australia	5,276	3,307	4,250	7,603	6,894
New Zealand	1,370	4,342	5,500	5,775	5,600
Ceylon	-	-	675	1,500	2,000
British Malaya	-	-	-	-	-
Burma	-	-	240	448	784
Kenya	139	-	-	182	160
Uganda	4	-	1,292	1,500	450
Tanganyika	-	1,400	3,087	2,966	3,000
Canada	54,616	50,035	108,202	141,625	135,000
Nigeria	-	-	-	535	600
Total	124,878	234,452	358,571	385,856	374,145

^{1/} Preliminary.

^{2/} Less than a 5-year average.

Compiled by Foreign Agricultural Service from official estimates of foreign countries, U. S. Foreign Service Reports, and other information.

TABLE 3.- Exports of unmanufactured tobacco in sterling area countries
calendar year 1952 with comparisons

Country	Average		1950	1951	1952
	1935-39	1945-49			
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
United Kingdom	1/ 5,996	1/ 4,699	-	-	-
Ireland	1/ 394	1/ 314	-	1/ 1,162	1/ 1,276
India	2/ 43,500	2/ 55,445	88,533	109,441	3/ 85,000
Pakistan	-	-	-	-	-
Burma	3,724	284	28	380	797
Ceylon	2,086	875	1,363	1,007	1,182
British Malaya	-	-	-	-	-
Australia	114	79	1	2	-
New Zealand	113	46	-	-	-
Union of South Africa	635	1,084	2,091	2,906	2,068
Southern Rhodesia	19,166	52,811	89,315	67,433	90,076
Northern Rhodesia	1,427	4,151	6,175	10,467	9,033
Nyasaland	12,810	20,950	23,758	27,281	20,811
Nigeria	-	-	-	-	-
Gold Coast	-	-	-	-	-
Kenya	-	32	5	39	3/ 85
Uganda	315	530	128	105	3/ 43
Tanganyika	562	2,250	2,533	1,354	3/ 1,500
Iraq	-	-	49	110	-
Sub-total	90,842	143,550	213,979	221,687	211,871
Canada	15,294	17,052	22,508	29,180	38,315
Total Countries Shown	106,136	160,602	236,487	250,867	250,186

1/ Re-exports.

2/ Includes Pakistan.

3/ Estimated on the basis of data available for 6 months or more of the year.

Compiled by Foreign Agricultural Service from official estimates of foreign countries, U.S. Foreign Service Reports, and other information.

TABLE 4.- Consumption of unmanufactured tobacco in sterling area countries
calendar year 1952 with comparisons

Country	Average		1950	1951	1952
	1935-39	1945-49			
	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds
United Kingdom	255,400	289,479	270,000	287,115	279,540
Ireland	9,101	12,172	14,996	16,342	16,240
India 1/ Pakistan	2/ 1,100,000	3/ 460,177	465,000	491,000	508,000
Burma	110,000	90,000	90,000	93,000	93,000
Ceylon	1,200	-	-	-	-
British Malaya	-	-	-	-	-
Australia 4/	25,070	26,089	28,332	29,000	29,500
New Zealand	6,007	7,774	9,940	10,236	10,000
Union of South Africa	22,144	37,297	43,171	43,270	45,000
Southern Rhodesia	1,250	3,000	5,000	6,000	7,000
Northern Rhodesia	-	-	-	-	-
Nyasaland	-	-	-	-	-
Nigeria	-	-	-	-	-
Gold Coast	-	-	-	-	-
Kenya	3/ 834	3/ 2,727	1,815	2,090	2,320
Uganda	3/ 1,734	3/ 2,672	1,630	1,915	2,140
Tanganyika	-	-	-	-	-
Iraq	5/ 3,307	11,000	11,460	11,460	11,460
Sub-total	1,536,047	942,387	941,344	991,428	1,004,200
Canada	3/ 46,600	73,400	83,740	75,967	86,414
Total Countries Shown:	1,582,647	1,015,787	1,025,084	1,067,395	1,090,614

1/ India fiscal year, April-March.

2/ Includes Pakistan.

3/ Less than a 5-year average.

4/ Australia fiscal year, July-June.

5/ Estimated from unofficial sources.

Compiled by Foreign Agricultural Service from official estimates of foreign countries, U. S. Foreign Service Reports, and other information.

TABLE 5.- Imports of unmanufactured tobacco in sterling area countries, calendar year 1952 with comparisons

Country	Average		1950	1951	1952
	1935-39	1945-49			
	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds
United Kingdom	258,486	335,845	305,805	354,878	223,743
Ireland	12,292	19,347	19,729	18,598	16,227
India	^{1/} 4,791	^{2/} 11,262	8,282	5,800	6,000
Pakistan	-	-	4,003	-	-
Burma	14,060	1,260	1	39	227
Ceylon	1,298	1,849	1,624	1,927	2,164
British Malaya	2,376	1,234	328	1,625	1,967
Australia	22,134	24,391	25,799	24,728	32,133
New Zealand	3,021	5,738	5,629	7,000	^{3/} 6,000
Union of South Africa	3,100	4,476	4,271	4,536	2,528
Southern Rhodesia	327	1,292	15	9,213	7,759
Northern Rhodesia	-	-	-	-	-
Nyasaland	-	15	-	5	-
Nigeria	2,919	4,021	5,050	5,994	6,000
Gold Coast	1,471	1,397	1,341	1,657	1,500
Kenya	(671	(3,083	742	1,683	^{3/} 1,700
Uganda	(671	(3,083	1,985	1,849	1,300
Tanganyika	188	247	161	439	^{3/} 400
Iraq	-	-	600	1,010	-
Sub-total	327,134	415,457	385,365	440,981	309,648
Canada	4,317	1,626	1,322	1,152	1,677
Total Countries Shown	331,451	417,083	386,687	442,133	311,325

^{1/} Includes Pakistan.

^{2/} Includes Pakistan through March 1948.

^{3/} Estimated on the basis of data available for 6 months or more of the year.

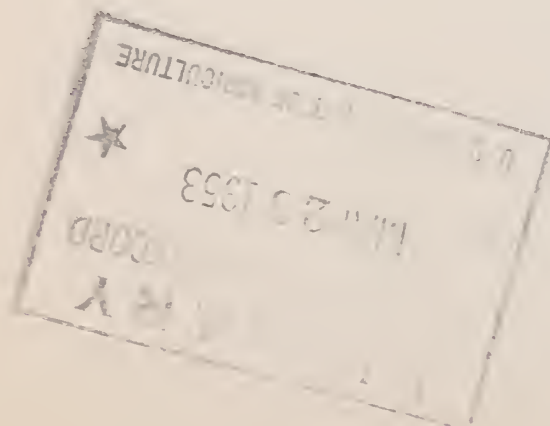
Compiled by Foreign Agricultural Service from official estimates of foreign countries, U. S. Foreign Service Reports, and other information.

TABLE 6.- Tobacco imports from other sterling area countries
calendar year 1952 with comparisons

Country	Average		1950	1951	1952
	1935-39	1945-49			
	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds
United Kingdom	49,130	69,545	130,559	110,013	81,301
Ireland	-	337	752	489	525
India	-	182	40	740	1,250
Pakistan	-	-	3,373	-	-
Burma	^{1/} 14,000	-	1	39	227
Ceylon	204	776	747	674	845
British Malaya	2,074	78	-	82	252
Australia	114	3,671	5,686	5,548	9,985
New Zealand	-	-	-	-	-
Union of South Africa	-	3,721	4,174	4,373	2,489
Southern Rhodesia	327	^{1/} 1,292	-	-	7,739
Northern Rhodesia	-	-	-	-	-
Nyasaland	-	19	-	5	-
Nigeria	40	^{1/} 505	1,536	1,500	1,500
Gold Coast	-	-	-	-	-
Kenya	-	-	292	1,012	1,500
Uganda	-	-	1,200	880	1,000
Tanganyika	183	^{1/} 299	-	212	210
Iraq	-	-	-	-	-
Sub-total	66,072	80,425	148,360	125,567	108,823
Canada	-	155	164	64	-
Total Countries Shown	66,072	80,580	148,524	125,631	108,823

^{1/} Less than a 5-year average.

Compiled by Foreign Agricultural Service from Official estimates of foreign countries, U. S. Foreign Service Reports, and other information.





FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
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WORLD TOBACCO TRADE DECREASES IN 1952

World trade in unmanufactured tobacco during 1952 was 9 percent below 1951. The decreased trade in 1952 was attributed to continued dollar restrictions by most of the importing countries for the purchase of tobacco as well as continued efforts by many countries to increase production and consumption of domestically-grown tobaccos. However, world trade for 1952 in comparable countries was 10 percent above the 1935-39 average. This excludes Bulgaria, Czechoslovakia, Poland and China in the 1935-39 average as well as in 1952, since no trade data were available from these countries for 1952.

Exports from the principal countries totaled 1,154,843,000 pounds in 1952 as compared with 1,282,019,000 pounds in 1951. The 1952 exports for comparable countries were 10 percent above the prewar average. The 1952 export decrease resulted primarily from lower exports from the United States, Algeria, and Brazil. The decrease was partially offset by increased shipments from Canada, Southern Rhodesia, Greece, Turkey, and Yugoslavia.

World imports for the principal countries were 1,054,120,000 in 1952 as compared with 1,143,813,000 in 1951. Total imports during 1952 for comparable countries were 9 percent above the prewar average.

World totals for countries listed in the accompanying table show exports consistently above imports. This discrepancy results from a number of factors including re-exports (which had not been shown as imports) in the export data, the omission of relatively large imports into the Soviet Union for which data are not available, and the omission from the table of a number of countries which have a small tobacco trade and whose exports materially exceed imports.

Principal Exporting Countries

In 1952 the United States continued to be the leading exporting country. Exports for the year totaled 395,019,000 pounds, or 24 percent below the 522,085,000 pounds exported in 1951. The United States exports comprised 34 percent of the total world exports of 1952 as compared with 41 percent in 1951. The decrease is primarily a result of unusually small takings by the United Kingdom, which took only 54.2 million pounds in 1952 as compared with 223.4 million pounds in 1951. Belgium, Luxembourg, Ireland, Sweden, and Switzerland also took less tobacco during 1952. These decreases were partially offset by increased shipments to Germany, the Netherlands, Australia, the Philippine Republic and Indonesia.

Of the total United States 1952 exports, flue-cured leaf accounted for 318.0 million pounds, or 81 percent of the total volume. Exports of this tobacco leaf in 1952 were 27 percent below the 1951 total of 433.8 million pounds. Burley exports in 1952 were 26.9 million pounds, or 7 percent above the 25.2 million pounds exported in 1951. Exports of Kentucky-Tennessee fire-cured tobacco was 21.8 million pounds in 1952, or 26 percent below the 29.2 million in 1951. Maryland tobacco exports in 1952 totaled 5.8 million pounds, or 27 percent below the 8.0 million pounds exported in 1951. Cigar leaf exports totaled 6.8 million pounds, which was about the same as in 1951.

All Latin American tobacco exporting countries combined exported substantially lower quantities in 1952 than in 1951. This decrease is primarily attributed to smaller shipments from Brazil, Colombia, and the Dominican Republic, which was partially offset by an increase from Paraguay. Most of the Latin American exports went to European countries.

The Oriental type tobacco producing countries of Southeastern Europe and the Near East reported slightly higher exports in 1952 than in 1951. Increased shipments were shown for Greece, Turkey, Yugoslavia, and Italy. Exports from Greece during 1952 were 32 percent above 1951; Turkey was 2 percent above; Yugoslavia, 34 percent above; and Italy, 3 percent above the 1951 exports.

Unmanufactured tobacco exports from Far Eastern countries were substantially lower in 1952 than in 1951. During 1952 only 277.1 million pounds of leaf tobacco were exported from Asiatic Countries as compared with 310.7 million pounds in 1951. Decreases in exports were reported for Syria, Hong Kong, and India in 1952. However, these decreases were partially offset by increased shipments from Japan, Indonesia, and the Philippine Republic.

Principal Importing Countries

Total world imports in 1952 totaled 1,055 million pounds. This was 8 percent below the 1,144 million pounds imported in 1951. This decrease is primarily attributed to smaller imports by the United Kingdom, the largest tobacco importing country in the world. During 1952 the United Kingdom's imports totaled 223.7 million pounds as compared with 354.9 million in 1951. This represented 21 percent of total world imports in 1952 as compared with 31 percent in 1951. Germany, the second largest 1952 importer, took 113.4 million pounds, an increase of 12 percent above the 101.7 million pounds imported in 1951. The United States, third largest importing country, took 103.1 million pounds, which was slightly below the 104.8 million pounds imported in 1951.

TOBACCO, UNMANUFACTURED: International trade, average 1935-39
annual 1951 and 1952

Continent and Country	Average 1935-39		1951 1/		1952 1/	
	Exports	Imports	Exports	Imports	Exports	Imports
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
NORTH AMERICA:						
Canada	15,294	4,317	29,422	1,152	38,315	1,677
Costa Rica	-	40	-	88	-	100
El Salvador	23	495	18	3,402	9	2/ 3,250
Guatemala	-	68	-	872	-	669
Honduras	1,894	43	3,930	146	2/ 1,700	161
Mexico	215	210	656	508	361	3,602
Nicaragua	-	175	-	613	-	600
United States	420,797	71,274	522,085	104,761	395,019	103,056
Cuba	27,712	-	38,134	-	40,343	-
Dominican Republic	13,652	-	35,257	-	33,609	-
Total	479,587	76,622	629,502	111,542	509,356	113,115
EUROPE:						
Austria	3/ 1,424	3/ 16,954	372	21,138	513	21,439
Belgium and Luxembourg	4/ 413	40,695	4/ 5,935	54,143	4/ 540	47,077
Bulgaria	59,396	-	5/	-	5/	-
Czechoslovakia	-	3/ 20,768	-	5/	-	5/
Denmark	490	20,206	190	22,160	46	22,183
Ireland	3/ 394	3/ 12,292	1,156	18,598	1,175	16,227
Finland	-	7,754	-	10,170	-	10,740
France	3/ 686	3/ 61,576	137	69,725	1,457	73,230
Germany	19	3/ 204,644	782	101,677	1,176	113,412
Greece	97,657	20	69,381	-	91,264	-
Hungary	19,162	3,106	5/	5/	5/	5/
Italy	12,927	5,253	16,878	5,560	17,344	4,317
Netherlands	4/ 3,249	67,349	4/ 4,739	51,169	4/ 10,137	56,881
Norway	-	6,602	-	8,351	-	8,982
Poland	3/ 149	3/ 18,404	-	5/	-	5/
Portugal	-	6,381	-	10,483	-	10,692
Spain	-	6/ 30,979	-	46,883	-	2/ 57,320
Sweden	153	14,829	-	26,570	-	19,230
Switzerland	-	15,795	-	23,433	-	2/ 24,000
United Kingdom	4/ 5,996	258,486	-	354,878	-	223,743
Yugoslavia	10,288	8,010	13,832	11,433	18,475	-
Total	212,403	820,103	113,402	836,371	142,127	709,473
ASIA:						
Lebanon	(	(	811	1,087	849	693
Syria	(2,762	(112	10,518	629	6,384	906
Turkey	78,054	152	123,879	-	125,964	-
Ceylon	2,086	1,200	1,007	1,927	1,182	2,163
China	30,994	56,613	5/	5/	5/	5/
French Indochina	3/ 216	2,718	-	12,377	-	6/ 25,468
Hong Kong	5/	10,450	21,189	25,275	1,672	6,106
India	43,500	4,791	109,441	5,847	2/ 85,000	2/ 6,000
Japan	14,700	5,458	1,526	3,646	2,200	22,739
Indonesia	101,176	2,765	28,473	14,588	2/ 29,000	2/ 17,000
Philippine Republic	37,357	1,075	13,856	9,871	24,828	32,542
Thailand (Siam)	13	3,405	-	1,697	-	6,177
Total	310,858	88,739	310,700	76,944	277,079	119,794

TOBACCO, UNMANUFACTURED: International trade, average 1935-39
annual 1951 and 1952 (Cont'd.)

Continent and Country	Average 1935-39		1951 1/		1952 1/	
	Exports	Imports	Exports	Imports	Exports	Imports
	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	pounds
SOUTH AMERICA:						
Argentina	180	16,878	46	5,853	-	763
Brazil	71,955	772	65,726	319	2/ 56,000	-
British Guiana	- 3/	393	-	516	-	591
Chile	-	172	-	752	- 2/	527
Colombia	6,472 3/	138	9,127	740	7,038 2/	4
Paraguay	7,747	202	5,886	105	9,512	-
Peru	-	212	-	850	-	900
Surinam	-	5/	- 2/	110	- 2/	110
Uruguay	-	3,051	-	10,719	-	7,507
Total	86,354	21,818	80,785	19,964	72,550	10,402
AFRICA:						
Algeria	24,979	7,482	29,870	9,489	23,710	9,777
French Morocco	- 3/	3,921	68	3,856	22	4,259
Belgian Congo	- 6/	1,000	-	6,112	-	5,258
Nyasaland	12,810	-	27,281	5	20,811	-
Egypt	-	13,014	-	27,910	-	26,402
Gold Coast	-	1,471	-	1,657	-	1,500
Madagascar	5,262	17	9,594	44 2/	8,000	-
Northern Rhodesia	1,429	-	10,467	-	9,033	-
Southern Rhodesia	19,166	327	67,433	9,213	90,076	7,759
Tunisia	- 3/	2,843	11	4,888	11	4,956
Union of South Africa	635	3,100	2,906	4,536	2,068	2,528
Total	64,281	33,175	147,630	67,740	153,731	62,439
OCEANIA:						
Australia	114	21,537	-	24,728	-	32,133
New Zealand	113	3,027	-	6,524	-	6,764
Total	227	24,564	-	31,252	-	38,897
Total for comparable countries 7/	1,044,009	966,130	1,282,019	1,143,813	1,154,843	1,054,120
Total countries shown:	1,153,710	1,065,021	1,282,019	1,143,813	1,154,843	1,054,120

1/ Preliminary. 2/ Estimated on the basis of data available for 6 months or more of the year. 3/ Less than a 5-year average. 4/ Re-exports. 5/ Not available. 6/ Approximated from unofficial information. 7/ Excluding Bulgaria, Czechoslovakia, Hungary, Poland, and China.

Office of Foreign Agriculture Service. Prepared or estimated from official statistics of foreign governments, reports of United States Foreign Service Officers and other information.



FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT 16-53

July 9, 1953

WORLD TOBACCO PRODUCTION FOR 1952-53 LOWER

The world tobacco harvest for the 13 months' period ending June 1953 is now estimated at 7,193 million pounds as compared with a previous forecast of 7,196 million pounds. The current 1952-53 estimate is 3 percent below the 7,420 million pounds produced during 1951-52. Excluding the Soviet Union, China, most of Eastern Europe 1/ from which only fragmentary information is available, world production for 1952-53 is placed at 5,337 million pounds, or 74 percent of the total world estimate.

This world estimate is only for countries shown and does not include tobacco produced in other countries which is consumed domestically and is of little importance. This estimate includes countries in the Torrid and South Temperate zones for the 1952-53 harvest, most of which occurs during the first half of 1953.

Decreased 1952-53 production was not reflected in 1952-53 consumption as consumption has increased substantially, especially cigarette-type leaf, in many of the large consuming countries. Since better economic conditions now prevail than a year ago, many countries are using more and better quality leaf. However, restricted use of dollar exchange in many countries will tend to adversely affect purchases of United States tobacco and favorably affect purchases from sterling and soft currency producing countries in the immediate months ahead.

Production of tobacco during 1952-53 in the United States decreased 3.3 percent; Canada, 12 percent; Germany, 31 percent; Greece, 36.5 percent; Italy, 22.5 percent; Yugoslavia, 47 percent; Burma, 6 percent; and Pakistan, 10 percent. Increases occurred in the following countries: Puerto Rico 16 percent; Spain 28 percent; India 3 percent; Argentina, Brazil, and Southern Rhodesia each 11 percent.

Summary of Production by kinds for Countries Shown

In this summary an attempt has been made to classify production by kinds of leaf. In many countries it has been necessary to arrive at the total production of each kind on an estimated percentage basis derived from absolute figures of relatively recent years. In a breakdown using this method the possibility of considerable error exists, inasmuch as the factors of production often differ by kind. It will be noted that very few statistics are available for the prewar average by kinds. No attempt has been made to show production by kind for Russia. The Chinese breakdown by kinds except flue-cured is estimated from unofficial sources.

1/ In this analysis Eastern Europe includes the following countries: Albania, Bulgaria, Czechoslovakia, Hungary, Poland, and Rumania.

Data on flue-cured leaf production has been compiled and published periodically in the past; consequently, more reliable information is available. For the other kinds, the possibility of error is much greater, not only from the standpoint of adequate and current reporting but also because of the variation of classification in different regions.

Flue-cured. World production of flue-cured leaf for 1952-53 is now placed at 2,277 million pounds, or 3 percent below the 1951-52 output of 2,347 million pounds. This decrease is primarily attributed to decreased production in the United States, which produced only 1,365 million pounds in 1952 as compared with 1,453 million pounds in 1951. Decreases also occurred in Canada, India, Northern Rhodesia, and the Union of South Africa. Increases which partially offset the decreases occurred in Brazil, Italy, Taiwan, Thailand, and Southern Rhodesia in 1952-53. Reports indicate that good quality leaf was produced in most countries this season.

Light Air-Cured:

Burley. Production of Burley leaf for 1952-53 is estimated at 688 million pounds as compared with 656 million pounds harvested during 1951-52. This is an increase of 5 percent, which primarily resulted from the 32 million pound increase in production for the United States. The United States production accounted for 94 percent of total estimated world production. Italy produced slightly over 11 million pounds of Burley tobacco; Germany produced over 6 million; Brazil and Japan each, about 4 million pounds during the 1952-53 crop year.

Other Light Air-cured. The estimated 1952-53 production of all other light air-cured leaf is 222 million pounds. This corresponds to 194 million pounds produced in 1951-52. Brazil ranked first in the 1952-53 production of this kind, with over 69.4 million pounds; Spain ranked second, with over 56 million pounds; the United States ranked third, with 39.5 million pounds in 1952; Argentina ranked fourth this season, with over 20 million pounds; and Paraguay was fifth, with nearly 12 million pounds.

Dark Air-cured. Leaf production of dark air-cured leaf, which constitutes about the same percent of world total as flue-cured leaf, during 1952-53 is estimated at 2,164 million pounds as compared with 2,211 million pounds during 1951-52. Cigar leaf production is included in the dark air-cured estimate. Estimated production declined in 21 countries during 1952-53 and increased in 19 countries.

Sun-cured. World estimated production of sun-cured leaf for 1952-53 is 743 million pounds as compared with 738 million pounds in 1951-52. Only a limited number of countries produce this kind, of which China reportedly is the largest, with about 500 million pounds, or 67 percent of the world (excluding U.S.S.R.) estimate for 1952-53. Other countries reporting production of sun-cured leaf include Costa Rica, Mexico, India, Korea, Thailand, Algeria, and Nyasaland.

Fire-cured. Estimated production of fire-cured leaf for the countries shown is 128 million pounds during 1952-53 as compared with 138 million pounds in 1951-52. The United States, the largest producer in 1952, produced slightly over 58 million pounds, or 45 percent of the total. Italy, the second largest producer, reportedly harvested nearly 42 million pounds in 1952-53. Nyasaland ranked third, with over 22 million pounds this season. The other countries shown as producers of fire-cured leaf include: Argentina, Southern Rhodesia and Tanganyika.

Oriental Leaf World production of Oriental or Turkish leaf during 1952-53 is estimated at 521 million pounds. This is 24 percent below the 687 million pounds produced in 1951-52. Less tobacco of this kind was harvested in practically every important producing country. Turkey is the largest single producer of this tobacco, which is used almost exclusively for blending purposes for cigarettes. Turkey's production constituted 37 percent of total Oriental leaf produced in 1952-53. During the 1952-53 crop year, Turkey produced 193 million pounds, which is one percent below the 1951-52 harvest of 195 million pounds. Greece, the second largest producer in 1952-53, produced 87 million pounds, or 17 percent of the total. Greece's 1952-53 production was 36 percent below the 1951-52 output due to less acreage being planted in tobacco this season. Other countries which produce Oriental, or semi-Oriental leaf include Bulgaria, Czechoslovakia, Italy, Yugoslavia, Syria, Lebanon, Northern Rhodesia, Southern Rhodesia, and the Union of South Africa.

Continent and Country	Acreage Harvested		Yield per acre 2/		Production	
	Average		Average		Average	
	1935-39	1945-49	1935-39	1945-49	1935-39	1945-49
	1,000	1,000	1,000	1,000	1,000	1,000
	acres	acres	Pounds	Pounds	pounds	pounds
NORTH AMERICA:						
Canada	69	110	1,103	1,103	1,293	1,470
Costa Rica	-	-	-	-	700	700
El Salvador	-	-	-	-	600	600
Guatemala	5	-	376	-	599	594
Honduras	-	12	-	-	500	509
Mexico	51	89	840	723	755	987
Nicaragua	-	-	-	-	892	900
United States	1,647	1,765	887	1,176	1,310	1,272
Cuba	107	132	475	559	542	550
Dominican Republic	25	47	985	960	967	889
Puerto Rico	44	34	673	800	844	847
Estimated total 2/	1,948	2,189	-	-	-	-
EUROPE:						
Belgium	6	7	2,500	1,785	2,107	2,150
France	44	63	1,676	1,486	1,666	1,532
Germany 6/	33	44	2,254	1,610	2,000	1,500
Greece	226	172	589	471	581	462
Italy	81	117	1,173	1,044	1,232	1,038
Spain	16	23	1,100	1,264	1,182	1,335
Sweden	1	1	1,735	1,000	1,665	1,443
Switzerland	1	3	1,571	1,700	1,707	1,575
Yugoslavia	39	70	969	889	669	460
Total countries shown	447	476	-	-	-	-
Other Europe 7/	221	299	-	-	-	-
Estimated total 5/	668	775	-	-	-	-
U. S. S. R.						
	490	520	1,129	865	865	865
ASIA:						
Iran	32	38	1,096	811	681	756
Iraq	11	11	752	750	674	734
Lebanon 8/	-	5	-	603	719	546
Syria 8/	13	14	699	624	800	748
Turkey	194	290	661	660	652	604
Burma	108	120	726	780	780	747
Ceylon	14	7	650	400	659	553
China 6/	1,228	1,320	1,021	998	1,000	1,000
India 6/	917	858	831	705	660	677
Indochina	44	26	728	482	572	667
Pakistan 6/	355	178	913	944	934	882
Indonesia	-	-	-	-	-	-
Java and Madura	69	26	982	549	406	402
Estate Native	349	100	402	400	304	304
Sumatra	-	-	-	-	-	-
Estate - Deli	31	9	990	880	507	507
Native - Kerf	-	-	-	-	269	269
Japan	92	95	1,621	1,393	1,591	1,537
Korea	46	39	1,252	1,053	1,020	1,200
Republic of the Philippines	176	88	427	489	726	723
Taiwan (Formosa)	4	9	1,458	759	1,275	1,361
Thailand (Siam)	25	40	688	511	400	400
Estimated total 5/	3,708	3,273	-	-	-	-
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Pakistan 6/	355	178	913	944	934	882
Indonesia	-	-	-	-	-	-
Java and Madura	69	26	982	549	406	402
Estate Native	349	100	402	400	304	304
Sumatra	-	-	-	-	-	-
Estate - Deli	31	9	9			

SOUTH AMERICA:											
Argentina	34	57	92	92	928	837	928	31,558	56,173	77,331	85,979
Brazil	237	315	388	405	851	609	642	202,703	235,094	237,442	262,347
Chile	9	7	8	6	1,846	1,685	1,702	16,618	13,610	13,428	10,974
Colombia	37	43	51	52	803	880	882	31,697	43,528	44,973	45,873
Paraguay	22	18	18	17	808	490	908	17,792	21,886	8,818	15,701
Uruguay	1	-	1	1	1,200	1,244	977	1,254	-	741	613
Venezuela	-	-	16	16	-	722	844	-	-	11,613	13,128
Estimated total 5/	340	440	574	589	-	-	-	301,622	370,291	394,252	434,625
AFRICA:											
Algeria	56	59	76	67	691	542	668	38,667	36,209	40,968	45,194
Nyasaland	57	80	85	85	286	315	385	16,311	25,843	26,800	32,704
Tanganyika	-	-	-	-	-	-	-	-	-	5,568	6,000
French Morocco	1	3	5	6	1,040	825	753	704	3,638	4,457	4,519
Madagascar	19	8	13	20	764	669	370	14,164	5,154	8,818	7,385
Mozambique	1	-	3	3	385	450	500	467	-	1,478	1,500
Nigeria	-	-	-	-	-	-	-	-	-	3,704	4,000
Northern Rhodesia	4	13	27	27	486	472	455	1,635	5,210	12,750	12,250
Southern Rhodesia	51	119	194	180	507	503	600	26,061	75,891	97,500	108,500
Union of South Africa	47	85	80	85	523	535	437	24,593	42,676	42,805	37,168
Estimated total 5/	236	367	483	473	-	-	-	122,602	194,621	244,848	259,220
OCEANIA:											
Australia	10	4	8	8	532	932	904	5,276	3,306	7,603	6,894
New Zealand	2	4	4	4	787	1,616	1,642	1,457	4,527	5,896	5,750
Estimated total 5/	12	8	12	12	-	-	-	6,733	7,833	13,499	12,644
Subtotal(excl. of U.S.S.R.:											
China and Eastern											
Europe) 7/	5,463	5,533	6,165	6,089				4,494,150	4,879,409	5,499,248	5,337,014
Estimated total for											
countries shown 7/	7,402	7,572	8,178	8,073				6,488,280	6,848,562	7,420,248	7,193,014

1/ Year beginning July 1. For North temperate zone countries, harvests July through October of the year shown; for all other countries, harvests November and December of the year shown and January through June of the following year. 2/ Yields are calculated from detailed acreage and production estimates rather than estimates rounded to the nearest thousand. 3/ Preliminary. 4/ Less than a 5-year average. 5/ Does not include tobacco produced in several countries of the area which is consumed indigenously and is of minor importance. 6/ Data for 1935-39 not comparable with subsequent years. Data for 1951-52 and 1952-53 are postwar areas. In the case of Germany, postwar data are for Western Germany only. In the case of China, postwar data do not include Manchuria. In India and Pakistan, due to changes in the method of estimating acreage and production, postwar data are believed to be more accurate than prewar. 7/ Includes Albania, Bulgaria, Czechoslovakia, Hungary, Poland, and Rumania. 8/ Separate data not available for 1935-39.

Foreign Agricultural Service. Official estimates of foreign countries, reports from U. S. Foreign Service Officers, results of office research, and other information.

FLUE-CURED TOBACCO: Estimated acreage, yield and production in specified countries, 1952-53 crop year 1/2 with comparisons

Continent and Country	Acreage Harvested			Yield per Acre 2/			Production		
	Average			Average			Average		
	1935-39 : 1,000 acres	1945-49 : 1,000 acres	1951-52 2/ : 1,000 acres	1935-39 : 1,000 acres	1945-49 : 1,000 acres	1951-52 2/ : 1,000 acres	1935-39 : 1,000 pounds	1945-49 : 1,000 pounds	1951-52 3/ : 1,000 pounds
NORTH AMERICA:									
Canada	61	91	111	1,070	1,100	1,294	54,616	100,071	144,055
Costa Rica	-	-	4/	-	-	310	-	-	143
El Salvador	-	-	1	-	-	600	-	600	900
Guatemala	4/	-	1	376	-	780	132	-	406
Honduras	-	-	1	-	-	349	-	-	205
Mexico	-	4	6	-	900	759	5/ 800	3,188	3,847
Nicaragua	-	-	1	-	-	892	-	870	581
United States	976	1,050	1,110	876	1,157	1,309	863,619	1,209,408	1,452,700
EUROPE:									
Germany	-	-	-	-	-	-	-	-	5,065
Italy	-	-	11	-	-	1,896	2,846	-	20,860
Bright Italia	-	-	14	-	-	-	-	-	24,956
ASIA:									
Burma	-	-	1	-	-	746	-	-	448
Ceylon	-	-	2	-	-	500	-	-	1,500
China	150	172	163	1,006	988	1,600	150,900	170,000	260,000
India	67	-	195	466	-	462	31,280	-	90,000
Indochina	-	-	-	-	-	-	-	-	662
Pakistan	-	-	5	-	-	888	-	-	4,000
Japan	-	-	-	-	-	-	890	-	-
Virginia Yellow	-	-	72	-	-	1,490	5/ 62,350	-	108,652
Korea	15	14	16	1,000	1,000	1,000	11,839	14,000	16,500
Philippine Republic	-	-	12	-	-	-	-	-	1,500
Taiwan (Formosa)	4	9	14	1,458	759	1,275	5,961	6,838	17,637
Thailand (Siam)	-	-	58	-	-	285	-	-	16,535
Indonesia	-	-	-	-	-	-	-	-	-
Java	-	-	20	-	-	334	-	-	6,614
SOUTH AMERICA:									
Argentina	5/ 1	-	14	900	-	862	918	-	12,074
Brazil	-	-	32	-	-	868	-	-	27,778
Chile	-	-	1	-	-	1,343	202	459	677
Venezuela	-	-	6	-	-	892	-	-	5,895
AFRICA:									
Nyasaland	-	-	-	-	-	-	2,574	-	4,000
Tanganyika	-	-	-	-	-	-	-	-	2,966
Mozambique	-	-	-	-	-	-	-	-	1,200
Nigeria	-	-	-	-	-	-	-	-	535
Northern Rhodesia	-	-	-	-	-	-	-	-	12,500
Southern Rhodesia	48	-	179	513	-	500	24,623	-	96,500
Union of South Africa	-	-	-	-	-	-	-	-	-
Amorello	-	-	-	-	-	-	-	-	2,635
Orinoco	-	-	-	-	-	-	(4,996	-	14,087
OCEANIA:									
Australia	10	4	8	532	-	932	5,276	-	7,603
New Zealand	-	-	-	-	-	-	1,428	-	5,775
Total, countries shown	-	-	-	-	-	-	-	-	2,347,035
									2,277,147

See footnotes at end of circular.

LIGHT AIR-CURED-BURLEY TOBACCO: Estimated acreage, yield and production in specified countries 1952 crop year 1/ with comparisons

Continent and Country	Acreage Harvested			Yield per Acre 2/			Production			
	1935-39 : Average 1,000 : acres :	1945-49 : Average 1,000 : acres :	1951-52 2/ : 1,000 : acres :	1935-39 : Average Pounds :	1945-49 : Average Pounds :	1951-52 3/ : Pounds :	1935-39 : Average 1,000 : pounds :	1945-49 : Average 1,000 : pounds :	1951-52 3/ : 1,000 : pounds :	1952-53 2/ : 1,000 : pounds :
<u>NORTH AMERICA:</u>										
Canada	9	11	3	1,195	1,151	1,457	10,749	12,664	3,609	2,000
Costa Rica	-	-	4/	-	-	-	-	-	2	2
Guatemala	-	-	4/	-	-	-	-	-	162	142
Mexico	-	1	1	-	1,200	1,163	-	1,602	1,344	1,561
United States	372	460	456	839	1,237	1,355	315,826	567,860	618,075	650,148
<u>EUROPE:</u>										
Germany	-	-	-	-	-	-	-	-	8,600	6,300
Italy	-	-	6	-	-	2,180	-	-	13,131	11,243
<u>ASIA:</u>										
India	-	-	-	-	-	-	-	-	-	-
White Burley	-	-	4	-	-	500	-	-	1,800	1,500
Japan	-	-	-	-	-	-	-	-	-	-
White Burley	-	-	2	-	-	2,010	-	-	4,098	3,975
<u>SOUTH AMERICA:</u>										
Argentina	-	-	3	-	-	2,000	-	-	600	600
Brazil	-	-	-	-	-	-	-	-	-	4,299
Chile	-	-	4/	-	-	-	1	154	101	194
Venezuela	-	-	3	-	-	714	-	-	2,302	3,684
<u>AFRICA:</u>										
Nyasaland	-	-	-	-	-	-	-	-	1,500	1,800
Northern Rhodesia	-	-	-	-	-	-	-	-	150	250
<u>OCEANIA:</u>										
New Zealand	-	-	-	-	-	-	29	-	121	150
Total, countries shown										
	-	-	-	-	-	-	-	-	655,595	687,848

See footnotes at end of circular.

OTHER - LIGHT AIR-CURED TOBACCO: Estimated acreage, yield and production in specified countries, 1952-53 crop year 1/ with comparisons

Continent and Country	Acreage Harvested			Yield per Acre 2/			Average			Production		
	1935-39	1945-49	1951-52	1935-39	1945-49	1951-52	1935-39	1945-49	1951-52	1935-39	1945-49	1951-52
	1,000 acres	1,000 acres	1,000 acres	Pounds	Pounds	Pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
NORTH AMERICA:												
El Salvador	-	-	1	-	-	600	-	-	-	-	-	400
United States	37	46	53	785	775	800	28,845	35,717	41,605	-	-	39,525
Maryland	-	-	-	-	-	-	-	-	-	-	-	-
EUROPE:												
France	-	-	-	-	-	-	-	-	-	-	-	1,102
Lege	-	-	-	-	-	-	-	-	-	-	-	-
Germany	-	-	-	-	-	-	-	-	-	-	-	950
Virginia Air-cured	-	-	-	-	-	-	-	-	-	-	-	-
Italy	-	-	4	-	-	2,440	-	-	-	-	-	8,598
Maryland	-	-	-	-	-	-	-	-	-	-	-	-
Spain	-	-	37	1,083	1,264	1,182	17,322	29,093	44,092	-	-	56,217
Kentucky and Valencia	16	23	42	-	-	-	-	-	-	-	-	-
ASIA:												
Syria	-	-	4	-	-	505	-	-	-	-	-	309
Virginia and Burley	-	-	-	-	-	-	-	-	-	-	-	-
SOUTH AMERICA:												
Argentina	-	-	21	-	-	820	-	-	-	-	-	20,500
Paraguay - Floja	-	-	14	834	-	473	13,344	-	-	17,400	-	11,775
Brazil	-	-	41	-	-	1,250	-	-	-	51,257	-	69,444
AFRICA:												
French Morocco	-	2	3	-	1,200	1,100	500	2,550	3,200	-	-	3,200
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-
Maryland	-	-	-	-	-	-	-	-	-	7,716	-	6,614
Union of South Africa	-	-	-	-	-	-	-	-	-	8,220	-	3,700
Total countries shown	-	-	-	-	-	-	-	-	-	193,626	-	222,234

See footnotes at end of circular.

SUN-CURED TOBACCO: Estimated acreage, yield and production in specified countries 1952-53 crop year $\frac{1}{2}$ with comparisons

Continent and Country	Acreage Harvested			Yield per Acre $\frac{2}{2}$			Average			Production		
	Average			Average			Average			Average		
	1935-39 1,000 acres	1945-49 1,000 acres	1951-52 1,000 acres	1952-53 1,000 acres	1935-39 1,000 acres	1945-49 1,000 acres	1951-52 1,000 acres	1952-53 1,000 acres	1935-39 1,000 pounds	1945-49 1,000 pounds	1951-52 1,000 pounds	1952-53 1,000 pounds
NORTH AMERICA:												
Costa Rica	-	-	2		-	-	800		-	-	1,839	1,855
Mexico	-	37	37		-	950	940		-	41,635	35,152	40,966
ASIA:												
China												
Light			500				1,000					
Dark			87				1,000					
India												
Natu							500					
Korea												
Native												
Thailand (Siam)												
AFRICA:												
Algeria												
Nyasaland												
Total, countries shown												

See footnotes at end of circular.

Continent and Country	Acreage Harvested				Yield per acre				Production			
	Average		Average		Average		Average		Average		Average	
	1935-39	1945-49	1951-52	1952-53	1935-39	1945-49	1951-52	1952-53	1935-39	1945-49	1951-52	1952-53
	acres	acres	acres	acres	Pounds	Pounds	Pounds	Pounds	pounds	pounds	pounds	pounds
NORTH AMERICA:												
Canada *	9	8	5	4	1,243	1,080	1,225	1,225	11,191	5,638	6,128	4,900
Guatemala	5	-	6	6	376	-	580	580	1,760	-	3,651	3,652
Honduras	-	-	9	13	-	-	550	546	-	-	5,000	7,000
Mexico	-	47	45	40	-	715	593	774	-	33,643	26,897	31,217
United States												
One Sucker	21	21	15	15	844	1,146	1,239	1,348	17,735	23,412	18,580	20,090
Green River	19	13	8	8	838	1,102	1,140	1,250	15,788	13,799	9,120	10,000
Virginia Sun-cured	3	3	4	33	844	932	1,145	1,100	2,769	3,047	4,008	3,740
Cigar Filler	42	41	40	29	1,273	1,451	1,594	1,550	53,575	59,380	62,958	44,795
Cigar Binder	34	43	32	31	1,462	1,523	1,565	1,536	47,836	65,818	49,824	48,311
Cigar Wrapper	10	14	13	13	955	1,020	1,091	1,111	9,108	13,911	14,928	14,508
Perique	4/	4/	4/	4/	454	604	660	600	192	206	264	180
Cuba *	107	132	144	136	475	559	542	550	50,833	73,812	78,000	74,674
Sun and Shade grown												
Dominican Republic *	((((((((((((
Criollo	25	47	41	45	985	960	967	880	24,625	45,093	39,682	40,000
Orlor	44	34	34	39	673	800	844	847	29,393	27,231	28,527	33,034
Puerto Rico *	6	7	5	5	2,500	1,785	2,107	2,150	16,431	12,499	11,244	10,540
EUROPE:												
Belgium	-	-	-	-	-	-	-	-	-	-	-	-
France	-	-	-	-	-	-	-	-	-	-	-	-
Paraguay	-	-	-	-	-	-	-	-	-	-	-	-
Germany *	-	-	-	-	-	-	-	-	-	-	-	-
Italy	-	-	-	-	-	-	-	-	-	-	-	-
Benevento	-	-	7	7	-	-	1,610	1,150	-	-	11,234	8,062
Nostreno	-	-	7	8	-	-	1,600	1,385	-	-	11,347	11,067
Sweden	1	1	1	1	1,735	1,000	1,665	1,443	1,061	1,036	699	592
Switzerland	1	3	2	3	1,571	1,700	1,707	1,575	2,276	5,431	4,078	4,012
ASIA:												
Iran	-	-	-	-	-	-	-	-	-	-	-	-
Cigarette	-	23	30	21	-	798	576	400	-	18,370	17,284	20,373
Pipe	-	11	7	6	-	773	880	866	-	8,512	6,173	5,201
Tombac (Water pipe)	-	4	2	3	-	980	1,350	1,150	-	3,938	3,307	4,078
Lebanon	-	-	-	-	-	-	-	-	-	-	-	-
Lebanese or local	-	8	2	4	-	700	1,250	600	-	5,600	3,000	2,4

FIRE-CURED TOBACCO: Estimated acreage, yield and production in specified countries 1952-53 crop year 1/with comparisons

Continent and Country	Acreage Harvested			Yield per Acre 2/			Average			Production		
	1935-39	1945-49	1951-52 3/	1952-53 3/	1951-52 3/	1945-49	1935-39	1945-49	1951-52 3/	1952-53 3/	1951-52 3/	1952-53 3/
	1,000 : acres	1,000 : acres	1,000 : acres	1,000 : acres	Pounds : Pounds	Pounds : Pounds	1,000 : pounds	1,000 : pounds	1,000 : pounds	1,000 : pounds	1,000 : pounds	1,000 : pounds
NORTH AMERICA:												
United States	23	13	10	10	1,041	1,340	18,804	13,542	13,400	12,250		
Virginia Fire-cured												
Kentucky-Tennessee	105	59	39	37	1,107	1,145	84,733	66,088	46,129	45,967		
Fire-cured												
EUROPE:												
Italy - Kentucky	-	-	34	27	-	1,384	-	-	47,059	35,869		
Italy - Subtropical	-	-	5	4	-	1,500	-	-	7,569	5,930		
SOUTH AMERICA:												
Argentina	-	-	2	2	-	1,300	-	-	2,307	2,579		
ASIA:												
Nyasaland	-	-	-	-	-	-	-	-	18,800	22,420		
Tanganyika	-	-	-	-	-	-	-	-	2,230	2,500		
Southern Rhodesia	-	-	-	-	-	-	-	-	715	350		
Total, countries shown	-	-	-	-	-	-	-	-	138,209	127,865		

See footnotes at end of circular.





FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT 17-53

July 24, 1953

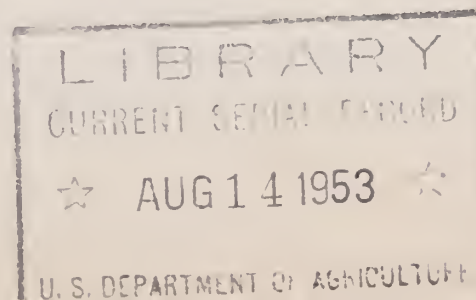
CANADA'S 1953 TOBACCO PRODUCTION LOWER: 1952 CONSUMPTION, STOCKS AND EXPORTS HIGHER

Canada's 1953 tobacco production is estimated at 11 percent below 1952, according to the Dominion Bureau of Statistics. Consumption of redried leaf in manufacture for the 1952 calendar year is reported at 14 percent above 1951. Stocks of unmanufactured tobacco, both domestic and imported, on December 31, 1952, is estimated at nearly 2 percent above stocks on the same 1951 date. Exports of unmanufactured tobacco increased 31 percent over 1951.

The 1953 Canadian tobacco production is officially estimated at about 125.0 million pounds from 102,000 acres. This corresponds with the 139.7 million pounds from 91,639 acres for 1952. This season's growing conditions have been excellent, however yields are not expected to compare with the unprecedented yield of 1,567 pounds per acre in 1952. Total flue-cured production for 1953 is expected to be about 116.0 million pounds as compared with 132.0 million in 1952.

Consumption of unmanufactured tobacco in manufacture during 1952 totaled 86.4 million pounds as compared with only 76.0 million pounds in 1951. The increased consumption in 1952 is primarily due to the increase in cigarette tax in April 1952. The 1951 consumption was 9 percent below 1950 due primarily to the increase in cigarette tax which became effective April 11, 1951. Consumption of domestic redried leaf constituted 97 percent of total consumption, of which domestic flue-cured leaf accounted for 85 percent of total leaf consumption; Burley, 6 percent; dark, less than 1 percent; cigar, 4 percent; pipe, 0.7 percent; and other, 0.3 percent. Redried imported leaf constituted the remaining 3 percent, most of which was cigar leaf.

Stocks of unmanufactured tobacco on December 31, 1952, is estimated at 167.5 million pounds as compared with 164.9 million pounds on the corresponding 1951 date. Flue-cured leaf comprised 79 percent of the December 1952 stock figure; Burley, 9 percent; cigar, 8 percent; dark, 1.4 percent; pipe, 1.4 percent; and other, 1.2 percent. The December 1952 stock total represents a 23.3 months leaf supply. Flue-cured stock on the same date represents a 21.6 months supply; Burley, 34.8 months; cigar, 29.9 months supply; based of course on the current consumption rate of each type.



Exports of unmanufactured tobacco during the 1952 calendar year totaled 38.3 million pounds as compared with 29.2 million pounds in 1951. The United Kingdom, the most important 1952 outlet, took 31.9 million pounds. The British West Indies ranked second, taking 3.2 million; other British Empire countries third, with 2.8 million pounds. Canada imported 1.7 million pounds of unmanufactured tobacco during 1952, of which the United States supplied 0.3 million pounds; Cuba, 0.5 million; and other foreign countries, 0.4 million pounds. The United Kingdom is reportedly planning to take about 25.0 million pounds of unmanufactured tobacco during the 1953 calendar year.

CANADA: Tobacco Production, Stocks, Consumption, Exports
and Imports, 1952 with comparisons 1/

Year	Production	Stocks on Dec. 31	Supply	Disappearance		Imports
				Domestic	2/ Exports	
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
1949	139,820	147,444	287,264	83,309	16,031	1,577
1950	120,298	154,459	274,857	83,370	26,760	1,322
1951	153,792	164,950	318,742	75,967	29,183	1,152
1952	139,719	167,463	307,187	86,414	38,318	1,677
1953	125,000	-	-	-	-	-

1/ Production data on farm sales weight, - all other redried weight.

2/ Consumption in manufacture.

Source: Dominion Bureau of Statistics.



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FOREIGN MARKET NOTES--TOBACCO

Market Developments in Asia, Africa, and Europe 1/

By George W. Thomas, Jr.
Tobacco Marketing Specialist

Trends in the consumption and production of tobacco competing with United States tobacco in the world markets and their possible effect on the future demand for United States tobacco were surveyed in March, April, and May 1953. Included were discussions in the various countries visited with producers, dealers, manufacturers, government officials, and others familiar with the world tobacco trade.

This brief report presents largely the highlights of the current situations found at the time of visiting each country. In general, observations made abroad tend to confirm established impressions of potential world developments in tobacco production, consumption, and trade. Thus, it will be seen from the appended table 1 that production of flue-cured tobacco has greatly increased since the prewar period. Foreign countries are encouraging and assisting greatly in the production. The trend is to greater production. There are material possibilities for increased production through increased yields. Continued scarcity of dollars is necessitating the encouragement of foreign production.

Generally speaking, foreign consumption of tobacco is not only increasing but also there is a shift in the kind of product, as well as to quality within the kind. The shift is to cigarettes and to a milder type of cigarette. High taxation in some countries is having a material restrictive effect but as a whole consumption is going up and it is expected that under the present favorable economic conditions the trend upward will continue.

1/ The survey was made under a cooperative agreement between the Department of Agriculture and Tobacco Associates, Inc., a producer organization, which, in this instance, also represented several other of the tobacco organizations.

United States tobacco continues to meet increased competition in foreign consuming markets. In the countries visited which are producing tobacco there was evidence of sustained efforts to increase production rapidly as well as to improve the quality in order to obtain a more favorable competitive position in the world. The most pronounced indication is the attractive prices being paid for these tobaccos.

The question of the future effect on the consumer taste for United States tobacco is debatable. However, it has been proven that a growing percentage of Southern Rhodesian tobacco can be blended with United States tobacco to produce an acceptable product in England. The German consumption is expected to increase materially, but it is questionable whether this increase can offset the loss in the United Kingdom.

As greater supplies become available from soft currency countries, a gradual decrease in exports from the United States may be expected under prevailing world trade conditions. However, because of the preference of consumers for cigarettes made from United States leaf and the inability of foreign producers to duplicate the taste and aroma of United States tobacco, shifts in consumption are likely to come slowly.

The Philippines

In April 2/ this Service commented upon the legislation restricting 1953 imports of cigarette tobacco to 14.3 million pounds and reported that requirements might materially overrun available supplies. Since that date, the Secretary of Finance of the Philippines transmitted to the House of Representatives a proposed bill to modify this legislation (Public Law 698). This Bill would have permitted the production of cigarettes at least at a level equal to that of the production in 1952. The Bill was referred to a Committee but died when it was not reported out of the Committee before the Congress adjourned.

It is estimated that the manufacturers of the American type blended cigarettes in the Philippines will be completely out of tobacco in November. Consequently, the Secretary of Finance, concerned about the future loss of revenue, has asked for an investigation as to whether or not an Executive Order modifying the present Public Law 698 may be issued to take care of the situation temporarily, i.e. until the Philippine Congress reconvenes following the elections in November 1953.

With the current high level of economic activity in the Philippines and the immediate prospects of a continuation at this level, it may be assumed that consumption of cigarettes will continue to rise. For many years, the Philippine people consumed tobacco in the form of cigars. However, it is quite noticeable that the younger generations are consuming tobacco in the form of cigarettes rather than cigars.

The Import Control Commission announced on April 17 that licenses would be issued for the importation of 11 million pounds of tobacco during the period January-June 1953. This will mean that about 3.3 million pounds should be licensed for import during the second half of this year.

The following information has recently been received from Manila:

1. The Import Control Commission, which ceased to exist on July 1, 1953, issued licenses to import 6,785,000 pounds of tobacco in 1953. This is considerably less than the announcement in April by the Import Control Commission (see above). This will leave a balance of 7,515,000 pounds which may be licensed for import during this calendar year.
2. The Central Bank of the Philippines will be responsible for issuing licenses in the future.
3. The 1953 flue-cured crop in the Philippines has been estimated at 1,000,000 kilos.
4. The production of blended cigarettes averaged over 88,000 cases a month for the period January through May 1953.

The 1953 production of cigar tobaccos in the Philippines is estimated at 37.5 million pounds of average quality. This can be compared with the 1952 crop of slightly less than 44.0 million pounds. The exports and contracts for exports of cigar tobacco have practically eliminated all the old stocks. During April one of the largest exporters procured all the stocks of tobacco held by the National Tobacco Company, a Government corporation which is being liquidated. Prices to the farmers are expected to be higher by 15 to 25 percent this year as a result of the increased interest in Philippine tobacco. This increase in prices for cigar tobacco practically eliminates the difference to the farmers in the cigar tobacco prices and the flue-cured prices which could remove a part of the incentive to switch production from cigar tobacco to flue-cured tobacco.

The United States has a two-fold interest in seeing that the Republic of the Philippines is successful in its operation of a tobacco import program: (1) One that would mean the most to the economy of the Islands; (2) maintaining a favorable trade relationship which would permit the United States to supply the tobacco desired and required by the consumers and manufacturers in the Philippines. This office will continue to follow this situation.

Formosa

There are about 5,000 farmers engaged in producing over 18 million pounds of tobacco in 1953 compared with 6 million pounds average in 1935-39. Stocks of locally produced tobacco are about 22 million pounds, making a total availability for 1953 of about 40 million pounds. This is flue-cured tobacco, principally Bright Yellow, Orinoco, and Cash varieties. Recently, there has been a considerable problem of tobacco plant diseases. However, there has been research in developing disease-resistant flue-cured varieties as well as in the production of Oriental and Burley types of tobacco. To maintain the production of the present blends of products, it will be necessary to import over 2 million pounds of flue-cured leaf prior to July 1, 1954.

United States tobaccos are used for blending and the Tobacco Monopoly expects to continue to import slightly over a million pounds a year with the current rate of consumption.

Hong Kong

Hong Kong produces no tobacco but has 4 reasonable sized manufacturing plants and, in addition, imports sizable quantities of cigarettes from the United States and England. The blended-type cigarette is not the most popular now but it is reported that its popularity is growing faster than the straight Virginia-type cigarette.

The factories in Hong Kong are using slightly over 4 million pounds of tobacco a year. This was supplemented in 1952 by imports of 3,638,000 pounds of cigarettes, two-thirds of which came from the United States and approximately one-third from England. Hong Kong is very active in exporting cigarettes. For example, in 1952, 1,456,000 pounds were exported. Of this amount, 349,000 pounds were domestically manufactured. Also, in 1952, 459,000 pounds of pipe, chewing tobaccos, and snuff were exported from Hong Kong, nearly all of which was domestically manufactured.

Manufacturing plants are very modern or are being completely modernized in expectation of a continued increase in consumption and an increase in exports of tobacco products manufactured in Hong Kong.

Considerable interest was shown in problems of blending American-type cigarettes which could be exported as well as used for local consumption. Two of the manufacturers asked for specific information regarding methods and materials for blending tobaccos for manufacturing American-type cigarettes.

There was considerable optimism regarding the possibility of the resumption of trade with the mainland of China. Chinese tobacco was being offered for sale to the manufacturers in Hong Kong, but, based upon the samples, it was obvious that it had not been redried. It was reported that India was selling some tobacco in Hong Kong and Macao. Based upon reports, if trade of nonstrategic materials between the United States and the mainland of China

were resumed, it is reasonable to assume that an active demand for United States tobaccos would be created. It was reported that an increased volume of flue-cured tobacco was being produced in China but that the quality had deteriorated very significantly. The consensus was that China would want and need sizable quantities of United States tobacco if trade were resumed and the licenses and the necessary dollar exchange were available.

Thailand

Thailand produced about 17.6 million pounds of flue-cured tobacco in 1953 compared to the 1935-39 average of 4.2 million pounds. Considerable work is being done by the Tobacco Monopoly to encourage production of flue-cured tobacco and to improve the quality through research and better cultural practices. For example, prices being paid to the farmers for tobacco by the Monopoly compared favorably with other agricultural commodities and, therefore, encouraged continuation of production.

There are 2 manufacturing plants in Thailand and a third under construction, reflecting the increased consumption of tobacco products and the expected continuation of the increase. The equipment of the redrying facilities and of the manufacturing plants are very modern and the operation appeared very efficient.

With the increase in consumption, it is anticipated that the requirements for United States tobacco will also increase somewhat. One of the biggest problems regarding the exporting of tobacco to countries in southeast Asia or the torrid zone is that of keeping the leaf without having it lose color rather rapidly due to climatic influences. The Monopoly reported that for this reason they prefer to carry only a 3 months' stock of United States tobaccos in the country with 3 month's supply in transit, and a minimum of 9 months' requirements being kept in storage in the United States.

India

India's production of flue-cured type tobacco in 1953 is estimated at approximately 75 million pounds, a reduction from 1952 of over 15 percent. This reduction was reported as being attributable to unfavorable planting and growing conditions as well as some weakening in the demand. According to the Government officials interested in the marketing of tobacco, India is concentrating on producing a neutral-type tobacco of good color that can be exported at a fairly reasonable price. The greatest interest for domestic tobaccos is in a kind of tobacco that is used in Bidis and water pipes. Production of tobacco for these products is increasing.

Consumption of tobacco products made of United States type tobaccos is fairly stable. The largest manufacturer substantiated this information. He reported also that he expected to obtain about the same quantities of United States tobaccos this year as in the preceding several years.

Considerable work is being done at research stations by Government officials, tobacco dealers, and associations in trying to increase materially the production and quality of flue-cured type tobacco in order to increase the export market. It is reasonable to expect an increase in production over the next several years.

Pakistan

Considerable experimentation in the growing of flue-cured tobacco in Pakistan has been and is being carried on with the result that approximately 5,000 acres of tobacco are being harvested this Spring, and are expected to yield approximately 1,000 pounds per acre. While the local tobacco does not have the color of the tobaccos produced in Madras, India, the manufacturers felt that the quality of the crop was much higher and contained less low grades than the Indian tobaccos. The largest manufacturer estimated that production could be increased to approximately 20,000 acres yielding about 20 million pounds annually. He felt it would take several years to reach this level, since it would be necessary to complete barns and warehouses for handling and storage of tobacco.

Consumption of cigarettes in Pakistan has increased from 4 billion in 1951 to 8 billion in 1952, and it is estimated to reach 12 billion in the calendar year 1953.

Stocks of United States tobacco on hand are of about 3 or 4 months' duration. The manufacturers estimate that they need about 2 million pounds of United States tobaccos in 1953. Discussions with Government officials indicate that every attempt will be made to provide the necessary funds.

Union of South Africa

The Union of South Africa's production for 1953 is estimated at 37 million pounds, approximately 12 million pounds being flue-cured (Orinoco), with 4 million pounds light air-cured, 20 million pounds dark air-cured, and approximately 1 million pounds oriental-type tobacco. All tobacco produced in the Union moves from the farms to a producer cooperative for prices established by the Tobacco Control Board (a committee made up of representatives of the producers, manufacturers, and cooperatives). The cooperatives in turn allocate tobacco to the manufacturers.

Consumption in the Union in 1952 was approximately 42 million pounds, of which 19 million pounds were flue-cured tobacco; 22 million pounds, air-cured tobacco; and about 1 million pounds, oriental-type tobacco.

Tobacco stocks held by the cooperatives, manufacturers and dealers on January 1, 1953, amounted to approximately 70 million pounds. This can be compared with stocks a year earlier of approximately 75 million pounds. There is considerable interest in the Union of South Africa in developing an export outlet for tobacco.

Southern Rhodesia, Northern Rhodesia, and Nyasaland

It is expected that these 2 British Protectorates and one self-governing colony will in 1953 become a Federation, which, for all practical consideration, will be an independent State.

The total flue-cured production for Southern Rhodesia for 1953 is estimated at 108 million pounds. This can be compared with the 1935-39 average annual production of 26 million pounds. The current average yield of 600 pounds per acre ranged by farms from about 200 pounds per acre to 1,200 pounds per acre. The quality of the 1953 crop is estimated as not quite up to average. The prices of the better grades of tobacco were, in the opinion of some of the buyers, slightly higher than the comparable grades of United States tobacco. However, on the lower end, the prices were cheaper than United States tobacco. The United Kingdom, which is by far the largest buyer of Southern Rhodesian tobacco, has a 20-cents per pound preferential duty for Southern Rhodesian tobacco. Therefore, the manufacturers may pay higher prices for the Southern Rhodesian tobacco than for United States tobacco and still obtain it at a lower net cost. However, this does not apply to the manufacturers on the European Continent.

Northern Rhodesia produced about 11.5 million pounds of tobacco in 1953, compared to the 1935-39 average of 1.6 million pounds. The quality of the crop was considered above average but the prices of Northern Rhodesian tobacco were in line with the Southern Rhodesian prices. It is expected that the crop average price will be greater, due to the fact that the Northern Rhodesian production contains more good tobacco.

Nyasaland was reported to have produced approximately 22.4 million pounds of very good quality fire-cured tobacco. The selling prices of fire-cured in the market in Limbe, Nyasaland, up to June 4, 1953, ranged from approximately 16 to 21 cents a pound.

Discussions with Government officials leading farmers, heads of research stations, buyers, and others, indicated that these countries would continue to increase tobacco production. Strong and concerted efforts are being made to continue in this direction. The goal is to increase production by 50 percent in the next 3 to 5 years. Substantial areas of land are available for the production of tobacco without interfering with the production of food crops. Some production problems have arisen in connection with diseases but these appear to be minor at this time. Also, it would be possible to increase total production substantially by increasing the average yield per acre.

Considerable research is being done to improve varieties and to develop and encourage cultural practices which will increase yields per acre and produce better quality tobacco. Much interest is being shown in this market by buyers for the Western European countries, the United Kingdom, and other sterling-area countries. A particularly successful producer (cultivating about 100 acres of tobacco a year with an average yield of approximately 1,200 pounds per acre) computes his cost of production per acre at approximately \$180. It is doubtful

that this sum included interest on the capital investment and other similar items. However, allowing for this, it appears that with an average yield of 1,200 pounds per acre adequate incentive is provided to encourage the production of tobacco at current prices.

Labor supply will be better under the Federation of the 3 countries which is scheduled to take place during this calendar year. It was reported that the greatest need at this time is for more supervisory personnel. If this need was met production should materially increase rapidly.

The big demand for tobacco produced in Central African countries has been created by the shortage of dollar exchange resulting in the governments of the United Kingdom, Australia, and other sterling-area countries pressing the manufacturers to procure as much tobacco as possible in the area. The United Kingdom manufacturers have agreed to take not less than 80 million pounds in 1953, 85 million pounds annually in 1954 and 1955, and 80 million pounds annually in 1956 and 1957, provided the required amounts are available in sufficient quality and are reasonably priced. In addition, Australia and other sterling-area countries are asking for 10 to 15 million pounds annually. It is estimated that Southern Rhodesia is consuming about 8 million pounds of tobacco a year and that the three countries after federation will consume about 15 or 16 million pounds of tobacco a year.

Considering all the points enumerated above, it seems reasonable to expect a further increase in tobacco production in these three countries.

Gold Coast

In February 1953 the duty on tobacco imported into the Gold Coast was increased 100 percent. This market took over 20 percent in 1951 and over 35 percent in 1952 of the total Black Fat, Water Baler, and Dark African tobacco exported from the United States. The increase in duty created considerable concern to the tobacco rehandlers in the United States and four days were spent in Accra discussing the situation with tobacco importers, government officials and others. The increased duty on the imports of tobacco was intended to obtain additional revenue. The effect this increase will have is still to be determined. However, it is expected that increase in price, which will be necessary, will result in some decrease in consumption.

The tobacco importers have been allocated about 10 percent more dollars to buy United States tobacco during the calendar year 1953 than in 1952. Licenses for almost the entire amount have already been issued, though the importers are still uncertain whether they will use all of the dollars licensed for this year.

The tobacco trade agreed that practically all the old stocks of tobacco which were imported under the previous low duty rate have now been consumed and that orders for shipping more United States tobacco to the Gold Coast would have to be placed at once.

The amount of profit that had been indicated as being made on tobacco must be questioned in that the tobacco moves through many diverse distributing channels prior to reaching the consumer. While the total amount may have reached an unreasonably high figure, several importers reported that tobacco will have to be used as a "loss leader" in their stores and that they will try to make their profit on other commodities. It was not felt that any unusual profits would be made by anyone at the present rate of duty.

It was announced that a plant for the manufacture of cigarettes was to be built in the Gold Coast during this year. The company to operate the plant proposed to produce sufficient tobacco in the Gold Coast necessary to meet its requirements.

The Gold Coast market is very important to the tobacco rehandlers in the United States. While the duty increase was for revenue reasons only, the situation needs to be carefully followed to determine the effect of the increased duties on consumption and needs for United States tobaccos.

Portugal

Tobacco is not produced in Portugal, since the government is attempting to develop production in the colonies and provide a market for the product in Portugal. The manufacturing of tobacco products in Portugal is controlled by the Government and contracts are entered into with manufacturers who are given franchises for long periods. Consumption of products of tobacco in Portugal has increased 10 percent in the last 4 years. However, exports of United States tobacco to Portugal from 1949 to 1952 decreased about 12.5 percent. The increase shown in imports of tobacco from other areas was attributed primarily to pressure brought by the Portuguese Government upon the local tobacco companies to import more from the nondollar countries. This is considered necessary in order that Portugal can sell its products such as fish and wine to tobacco-exporting countries.

Stocks of tobacco are considered fairly reasonable. However, there is a definite demand for greater quantities of United States tobacco. Indications are that the Government expects to continue to limit imports from the dollar areas where possible. Time did not permit a survey of the availabilities of imported tobacco products but there were several indications that a not inconsequential volume was on hand.

France

The decreased takings of United States fire-cured tobaccos by France were discussed with representatives of the French Government and the Tobacco Monopoly. The same question was not raised as regards imports of flue-cured and Burley tobacco because in 1952 the imports were considered reasonable in light of the usings.

The French Government officials indicated that they would like very much to buy fire-cured tobacco and dark air-cured tobacco. However, they claim that free dollars are not available and stated that if they were permitted to use MSA dollars to finance the procurement of tobacco they would like to import some fire-cured and dark air-cured as soon as possible.

Discussions with representatives of the French Tobacco Monopoly indicated that they would like to reintroduce fire-cured tobacco in the popular brand cigarettes. If done, this would mean that the fire-cured and dark air-cured tobacco annual requirement would be about 7 to 8 million pounds. It was pointed out, however, that this was contingent on being able to continue obtaining these kinds of tobacco, since they felt it best not to change the blends constantly. While it was recognized that the dollar scarcity would probably continue to be a problem, it was stated that probably strong efforts to develop compensation arrangements which would permit the movement of United States tobacco to France would be a solution.

Consumption of tobacco products in France was about 5 percent lower in 1952 than in 1951. This does not include "black market" cigarettes, for which no estimate is available. It is interesting to note that the Balto brand (American blended-type cigarette) sales have remained fairly constant in the last 3 years while the "Week-end" and "High Life" straight Virginia-type cigarettes sales have dropped off materially. During the same period, however, imports of United States manufactured cigarettes increased from 175 million in 1950 to 680 million in 1952, while the legal imports of English manufactured cigarettes increased from 25 million to 310 million.

Germany

Effective June 8, taxes on tobacco products in Western Germany were adjusted downward. For example: Six cigarettes now will be sold for approximately 12 cents, which heretofore was the price of five cigarettes. This should make a material difference in the total consumption of tobacco in Germany. It has been estimated that cigarette consumption should increase about 25 percent, or up to about 39 billion pieces annually. This would require approximately 95 million pounds of tobacco, of which 50 percent should be of United States origin.

Prices of other tobacco products have also been adjusted downward and it is estimated that the consumption of smoking tobacco, pipe, and tobacco for roll-your-own cigarettes should also increase about 10 percent, requiring approximately 37 million pounds of tobacco. Less than 40 percent of this amount, however, is estimated to be required from the United States.

United Kingdom

The United Kingdom is the largest importer of tobacco in the world. It is also the largest foreign market for United States flue-cured tobacco. The total manufactures using of tobacco in 1952 dropped about 2 percent while the usings of tobacco of United States origin decreased over 6 percent. A downward trend has been established in the use of tobacco of United States origin, which began in 1949. The United States supplied about 64 percent of the tobacco used in the United Kingdom in 1949 with the percentage of 58 percent in 1950, 54 percent in 1951, and 52 percent in 1952, a reduction of about 12 percent in the last 4 years.

It is anticipated that the consumption in 1953 will increase over 1952. However, the present estimate for 1954 is that consumption again will decrease. One of the basic reasons for the decrease in the consumption level is the high cost of cigarettes which is equivalent to over 50 U.S. cents for a package of 20 cigarettes, while it is estimated that the average hourly wage is about 45 cents. In view of this, the number of new smokers each year is getting smaller and at the same time older smokers are being lost to the market. Considerable concern was expressed regarding this situation in that it is unknown as to how long this trend will continue.

Another important question from the United States viewpoint is that if the percentage of United States tobacco used in cigarettes is reduced further, will the taste and demand for products manufactured from United States tobacco be eliminated? If so, as soon as sufficient supplies are available from other sources will this result in a shift completely away from the use of United States tobaccos?

In table 2 are shown imports of tobacco by these countries, from all sources and from the United States.

Table 1. - Tobacco Production

Flue-cured	Average 1935-39	Estimated 1952	Estimated 1953
	Million pounds	Million pounds	Million pounds
Philippine Republic	-	1.5	2.0
Formosa	6.0	17.6	18.7
Thailand	4.2	16.8	17.6
India	31.3	90.0	75.0
Pakistan	-	4.0	5.0
Union of South Africa	5.0	16.7	12.1
Southern Rhodesia	24.6	96.5	108.0
Northern Rhodesia	-	12.5	11.5
Nyasaland	2.6	4.0	3.5
Germany	-	5.1	5.9
Total	73.7	264.7	259.3
Fire-cured			
Nyasaland	12.5	18.8	22.4

Source: Compiled from trade and official sources.

Table 2. - Tobacco imports by countries from all sources and from the United States

Country	Average 1935-39			1951			1952		
	Total	Imports from United States	Percent	Total	Imports from United States	Percent	Total	Imports from United States	Percent
	Million pounds	Million pounds	Percent	Million pounds	Million pounds	Percent	Million pounds	Million pounds	Percent
Philippine Republic	1.1	1.0	90.9	9.9	9.8	99.0	32.5	32.5	100.0
Formosa	0.6	0.5	83.3	0.9	0.9	100.0	1.3	1.3	100.0
Hong Kong	10.4	3.1	29.8	25.3	5.1	20.2	6.1	6.1	59.0
Thailand	3.4	2.6	76.4	1.7	1.6	94.1	6.1	6.1	100.0
India	4.8	2.9	60.4	5.8	4.7	81.0	4.2	4.2	70.0
Pakistan	-	-	-	12.1	0.7	0.6	9.6	1.4	14.6
Union of South Africa	3.1	0.2	0.6	4.5	0.2	0.4	2.5	0.1	-
Southern Rhodesia	0.3	-	-	9.2	-	-	7.8	-	-
Gold Coast	1.5	1.4	93.3	1.7	1.7	100.0	1.5	1.3	86.7
Portugal	6.4	4.7	73.4	10.5	7.9	75.2	10.7	7.8	72.9
France	61.6	19.7	32.0	69.7	10.7	15.4	73.2	6.9	9.4
Germany	204.6	12.4	0.6	101.7	52.3	51.4	113.4	52.8	46.6
United Kingdom	258.5	200.8	77.7	354.9	212.0	59.7	223.7	66.8	29.9
Total	556.3	249.3	44.8	607.9	307.6	50.6	494.4	184.7	37.4

1/ United States exports to Formosa.

Source: Compiled from trade and official sources.



FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT 19 - 53

July 30, 1953

INDIA'S TOBACCO PRODUCTION HIGHER EXPORTS, AND IMPORTS LOWER

India's 1952-53 tobacco production is estimated at 9 percent below the 1951-52 output according to Clarence E. Pike, Agricultural Attache, New Delhi. Exports of unmanufactured tobacco during 1952 are estimated at 26 percent below the 1951 total. Imports were slightly lower in 1952 than in 1951.

Estimated 1952-53 tobacco production for India is 515.2 million pounds from about 800,000 acres as compared with 470.4 million pounds from approximately 700,000 acres in 1951-52. The increase in acreage and production during 1952-53 occurred in the states of Bombay, Hyderabad and Rajasthon. All the increase occurred in native type leaf production as flue-cured acreage and production declined.

Flue-cured leaf production for 1952-53 is placed at 32.0 million pounds from 180,000 acres. This is 9 percent less than the 90.0 million pounds from 195,000 acres grown in 1951-52. The 1952-53 decline is attributed, first to the more attractive prices offered for other kinds of tobacco and food crops as compared with flue-cured prices, secondly, to unfavorable weather conditions at planting time in the major growing area, and thirdly, to beetle damages in the State of Madras.

Unmanufactured tobacco exports totaled 82.9 million pounds valued at \$28.4 million U.S. during 1952 as compared with 109.4 million pounds valued at \$28.6 million U.S. The United Kingdom continued to be the leading export outlet during 1952 taking 35.7 million pounds. Pakistan ranked second with 4.8 million pounds, the Soviet Union ranked third with 4.7 million pounds. During January-March 1953 India exported only 8.8 million pounds as compared with 16.9 million pounds during the comparable 1952 period. Over 50 percent of the exports in the first quarter of 1953 were to the United Kingdom.

Exports of manufactured tobacco products during 1952 totaled 6.1 million pounds valued at \$5.9 U.S. This is slightly lower than the 1951 total of 6.6 million pounds valued at \$5.9 U.S. The 1952 exports consisted primarily of Bidis, Hookah and chewing tobacco most of which went to nearby Asiatic countries.

Imports of leaf tobacco during 1952 totaled 5.3 million pounds valued at \$4.0 million U.S. or practically the same as in 1951. The United States continued to be the most important leaf source, mostly flue-cured, supplying 4.1 million pounds. During January-March 1953 India imported 1.5 million pounds of leaf tobacco of which 0.7 million pound came from the United States.

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FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT 20-53

July 31, 1953

WESTERN GERMANY ADJUSTS TAX RATES ON TOBACCO PRODUCTS. 1/

Effective June 8, 1953, the tax rates applicable to tobacco products were reduced. The tax reduction which was accompanied by reduction in the retail prices was designed to improve the financial position of the German tobacco industry, especially the small and medium sized firms. As a result of the anticipated increase in consumption, the Finance Department is not anticipating any material decrease in the total revenue received by the Government of the Federal Republic. It is reported that cigarette sales increased between 25 and 35 percent during the first month after the reduction went into effect. However, this is not sufficient time to give any indication of a long term trend. The new law provides tax adjustments as follows:

Table I. Germany: Tobacco tax rate effective June 8, 1953 with comparison of old rate.

Product	Tax as percent of retail price	
	New Tax Rate	Old Tax Rate
	Percent	Percent
Cigarettes.....	52.5 to 57.6	53
Cigars (ea.) to .095 U.S. cents.....	23	28
Cigars (ea.) over .095 U.S. cents.....	23	33
Chewing Tobacco.....	6.3 to 17.5	18
Fine Cut Tobacco.....	47.6	53
Fine Cut Tobacco including at least 50 percent domestic tobacco.....	31.0 to 37.5	50
Raw Cigarette Tobacco priced \$130.90 for 220 lbs.....	No Tax	
Coarse Cut Pipe Tobacco.....	28	43
Coarse Cut Pipe Tobacco including at least: 50 percent domestic tobacco.....	25	43
Snuff.....	12	23
Cigarette Paper per 1,000 sheets.....	1.14	\$.24

Source: Computed in the Office of Foreign Agricultural Service based in part on Foreign Service Reports.

1/ Dollar Value figures in this circular were converted from Deutsche Mark at 23.8 U.S. cents.

The new tax law further provides for additional tax reduction for manufacturers of cigarettes, cigarette paper, cigars and smoking tobacco. This special reduction is based on the amount of tax revenue paid quarterly by the manufacturer as shown in the following tables.

Table II. Cigar Manufacturers

Quarterly Tax	Special Tax Reduction
U.S. dollars	Percent
1. On any amount up to \$1,904.00	20
2. Between \$1,904.24 and \$7,140.00	8
3. Between \$7,140.24 and \$15,232.00	3

Cigar manufacturers whose quarterly payments exceed \$26,180.00 U.S. will have the above rate reduced 25 percent, above \$30,940.00 reduced 50 percent, above \$35,700.00 will receive no special tax reduction.

Table III. Cigarette Manufacturers

Quarterly Tax	Special Tax Reduction
U.S. dollars	Percent
1. On any amount up to \$35,700.00	10
2. Between \$35,700.24 and \$113,050.00	7
3. Between \$113,050.24 and \$3,332,000.40	4

Cigarette manufacturers whose quarterly payment exceeds \$666,400.00 U.S. will have the above rate reduced 25 percent, above \$1,118,600.00 reduced 50 percent and above \$1,666,000.00 will receive no tax reduction.

Table IV. Manufacturers of Fine Cut Tobacco

Quarterly Tax	Special Tax Reduction
U.S. dollars	Percent
1. On any amount up to \$4,284.00	12.5
2. Between \$4,284.24 and \$15,470.00	6
3. Between \$15,470.24 and \$30,940.00	3

Manufacturers of fine cut tobacco whose quarterly payments exceed \$52,360.00 U.S. will have the above rate reduced 25 percent, above \$57,120.00 reduced 50 percent, and above \$61,880.00 will receive no special tax reduction.

Table V. Manufacturers of other smoking tobacco

Quarterly Tax	Special Tax Reduction
U.S. dollars	Percent
1. On any amount up to \$1,904.00	18
2. Between \$1,904.24 and \$5,950.00	12
3. Between \$5,950.24 and \$11,900.00	6

Manufacturers of smoking tobacco whose quarterly tax payment exceeds \$21,420.00 U.S. will have the above rate reduced 25 percent, above \$35,700.00 reduced 50 percent, and above \$52,360.00 will receive no special tax reduction.

Table VI. Manufacturers of cigarette paper

Quarterly Tax	Special Tax Reduction
U.S. dollars	Percent
1. On any amount up to \$1,904.00	20
2. Between \$1,904.24 and \$2,856.00	15
3. Between \$2,856.24 and \$3,570.00	10

Manufacturers of cigarette paper whose quarterly tax payment exceeds \$5,950.00 U.S. will have the above rate reduced 25 percent, above \$6,545.00 reduced 50 percent, and above \$7,140.00 will receive no special tax reduction.

The following table indicated the consumption trend of tobacco products since the war in Germany:

Table VII. Tobacco Consumption in Western Germany during 1952 with comparisons

Year	Cigarettes	Cigars	Fine Cut Smoking Tobacco	Pipe Tobacco
	Billions pcs.	Billions pcs.	1,000 tons	1,000 tons
1949	22.0	2.2	16.0	5.2
1950	23.7	3.8	15.6	4.8
1951	28.3	4.1	15.4	4.8
1952	30.7	4.3	13.6	4.3
First quarter 1953 increase over first quarter 1952	+ 7%	- 3%	- 15%	- 14%

Consumption has been increasing steadily in the form of cigarettes.

It has been estimated that the tax adjustment referred to above will result in an increase in the consumption of cigarettes of about 25 percent and of smoking tobacco by approximately 10 percent. No increase is anticipated in the total consumption of cigars. This could mean an increase in the requirements

for U.S. tobacco. However, it has been reported that manufacturers have agreed not to exceed an average of 50 percent usings of U.S. tobacco in their total production. This is a further reduction from the 1952 percentage of U.S. tobacco usings of the total.

Percentage of usings of tobacco by Kind and Product
Cigarettes

Year	U.S.	Oriental	Other	Domestic
1951	53.7	37.5	1.7	2.2
1952	52.4	39.2	5.7	2.7
1953 est.	50.0	39.6	7.5	2.9

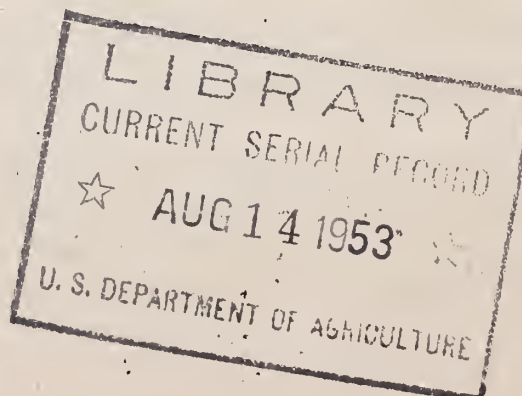
Smoking Tobacco

Year	U.S.	Oriental	Other	Domestic
1951	41.2	9.9	6.7	42.2
1952	40.7	5.9	8.6	44.8
1953 est.	38.0	5.0	9.6	47.4

According to information received from trade sources the free dollars to be allocated for the 1953 tobacco import program for Western Germany have been approved as follows:

Industry	Dollars Million
Cigarette	31.6
Smoking Tobacco	10.5
Chewing and Snuff	.2
Cigar U.S.	7.4
Cigar (Cuba, Domingo etc.)	1.1
Cigar Lebanon	.2
Total	51.0

Indications are that the dollars will be made available in three installments, the first in September 1953, then December 1953 and March 1954.





FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT 21-53

August 3, 1953

DEVELOPMENTS IN THE TOBACCO INDUSTRY OF GREECE

Production

The 1953 tobacco crop of Greece is tentatively estimated at about 61.8 percent above the 1952 output according to P. Hudson and C. Sanliotis, American Embassy, Athens. This estimate based on the comparable acreage, assuming comparable yields should be about 140 million pounds. Tobacco production during 1952 was only 87.0 million pounds as compared with 137.1 million pounds in 1951. The 1952 crop was smaller than usual because previously produced tobacco had not been marketed and prices were extremely low therefore substitute feed crops were planted. However, markets for the tobacco stock on hand were found and much of the leaf sold at fair prices which gave the producers the incentive to produce tobacco in 1953.

Exports

Tobacco exports during the 12 month period ending June 1, 1953 totaled 91.3 million pounds as compared with 69.2 million pounds during the comparable preceeding period. During the first five months of 1953 (January-May) Greece exported 47.7 million pounds of which Western Germany took 11.8 million pounds or approximately 25 percent of the Greek exports. Greek exporters believe that the decrease in German tax on tobacco, which went into effect on June 8, 1953, will encourage greater trade with that country. In order to encourage exports to Eastern Germany, the Foreign Trade Committee of the Ministry of Commerce has arranged for the export of tobacco to that country for clearance through Italy in exchange for Italian goods. The devaluation of the Greek currency in April of this year may also have a favorable effect on total exports of tobacco.

Factory Manipulation

Greece recently enacted law number 2348 which abolished the organization of Tobacco Workers (T.A.K.) which in the past has required the factory owners to hire their labor from this organization at wages many times greater than that received by the tobacco farmer for his products. The Tonga Law also required that as many men be hired as were women. However, a better job of tobacco manipulation can be done by women, whose wages are less than men. After the passage of the law 2348, the factory owner can hire whomever he wishes, as long as his activities are approved by a special committee composed of representatives of the exporters, the workers, the Ministry of Labor and the Security

Officials. This law also requires the retirement of all tobacco workers over 50 years of age who were members of the T.A.K. organization. Those retired will receive a pension provided they have worked at tobacco manipulation for 2,700 days, 300 of which were during the five years. Funds for the pensions will be raised from tobacco export tax.

Officials of the Greek Government and of the Federation of Tobacco Merchants are confident that the new law will materially reduce the cost of factory manipulation as it will provide cheaper and more effective labor and more direct control over employees.

Stocks

On June 1, 1953 exportable stocks were estimated at 108.9 million pounds of which 77.0 percent is from the 1952 crop which usually does not move into export channels until September 1953. Exportable stocks were 163.6 million pounds on the same 1952 date.

Cigarette Consumption

Consumption of cigarettes during January-May 1953 totaled 8.6 million pounds as compared with 3.9 million pounds in the same 1952 period. In addition to the tobacco consumption in manufactured form, many tobacco growers roll their own cigarettes which totals about 1.8 million pounds annually.

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UNITED STATES DEPARTMENT OF AGRICULTURE
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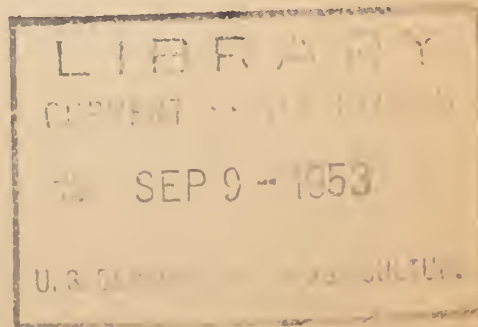
August 26, 1953

ERRATUM

The following corrections should be made on page 2, first paragraph, fourth sentence of FT 22-53, Foreign Market Notes - Tobacco, "Notes on the Tobacco Situation in the Netherlands," by George W. Van Dyne, Marketing Specialist, issued August 14, 1953:

Sentence should read as follows:

"Imports from the United States increased from 26,982,000 pounds in 1950 to 28,964,000 in 1951 but decreased to 19,985,000 pounds in 1952."





FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT 22-53

August 14, 1953

FOREIGN MARKET NOTES--TOBACCO

Notes on the Tobacco Situation in the Netherlands 1/

By G. W. Van Dyne
Marketing Specialist

The tobacco manufacturing industry in the Netherlands maintained its general postwar progress during 1951 and 1952. The cigarette branch, in particular, forged ahead. Foreign trade branches, however, were not so successful. Imports of unmanufactured tobacco, hampered especially by the shortage of dollar exchange, decreased about 8 percent in 1952 as compared with 1951. Imports of manufactured tobacco, particularly cut tobacco, also declined in 1952, as compared with the previous year. Exports of cigarettes decreased also. Production and exports of domestic leaf were not important and showed little change.

Manufacturing

Factory output of cigarettes during 1952 set an all-time record of 9,340 million pieces (see table 1). Over 75 percent of all cigarettes consumed in the Netherlands are the bright Virginia-type made with varying percentages of United States flue-cured leaf. Practically all of the remainder are United States blended type. There are definite indications of a shift in consumer preference to these. Consumer prices for cigarettes range from a low of f. 0.60 2/ (15.9¢ U.S.) per pack of 20 pieces to a high of f. 1.00 (26.45¢ U.S.) per pack of 20. The most popular brands sell at f. 0.75 (19.8¢ U.S.) per pack of 20.

1/ Part of a continuing study of foreign market outlets and competition with United States tobacco being conducted by Mr. Van Dyne, under the provisions of the Agricultural Marketing Act. Mr. Van Dyne is stationed in Paris, France, to report on tobacco markets in Western Europe and the Mediterranean area. He acknowledges the help given him by the tobacco trade, government officials of the Netherlands, and members of the staff of the United States Embassy at The Hague.

2/ United States \$1.00 equals Florins 3.78.

Table 1. Netherlands: Output of manufactured tobacco products by categories, average 1935-39 and annual 1950 through 1952

Year	Cigarillos & Cigars	Cigarettes	Cut Tobacco
	Million pieces	Million pieces	1,000 pounds
Average			
1935-39	1,541	4,042	28,353
Annual			
1950 . . .	880	8,200	29,806
1951 . . .	860	9,110	30,300
1952 . . .	930	9,340	29,640

Source: Netherlands, Central Bureau of Statistics.

Imports

Netherlands' imports of unmanufactured tobacco, including scrap and stems, decreased from 64,002,000 pounds in 1951 to 58,760,000 pounds in 1952. The annual average during the five years, 1935-39, was 67,349,000 pounds. The United States was the principal source of supply in 1952 followed by the Netherlands Indies, Brazil, Southern Rhodesia and India. Imports from the United States dropped from 26,982,000 pounds in 1950 to 28,964,035 in 1951 and 19,984,699 pounds in 1952. About 75 percent of this leaf was flue-cured. The trade state that this type was responsible for most of the decline. This, of course, was due mainly to the shortage of dollar exchange, but high prices were an important contributing factor. Because of this, Rhodesian and Indian flue-cured tobaccos were substituted in substantial quantities. Imports of Indian leaf were negligible in the early postwar years, during which period no leaf was imported from Rhodesia. During 1952, imports from Rhodesia totaled 4,950,000 pounds and those from India 2,700,000 pounds. The long-term view is that imports of flue-cured tobacco from these two countries will increase, particularly Rhodesian, unless prices, especially for United States nondescript, common and low-side medium grades are made more competitive.

Imports of manufactured tobacco in 1952 decreased as compared with 1951 (see table 2). During recent years the bulk of these products originated in the United States and the United Kingdom. However, important quantities were supplied by Belgium and Luxembourg. The trade state that high landed costs and internal taxes are killing the cut-tobacco imports and slowing up imports of other tobacco products.

Table 2. Netherlands: Imports of manufactured tobacco by categories, average 1935-39, annual 1951 and 1952

Year	Cigarillos & Cigars	Cigarettes	Cut Tobacco
	1,000 pieces	1,000 pieces	1,000 pounds
Average			
1935-39	750	434,000	1,437
Annual			
1951	19,162	400,000	2,037
1952	14,143	390,000	648

Source: Netherlands, Central Bureau of Statistics.

Exports

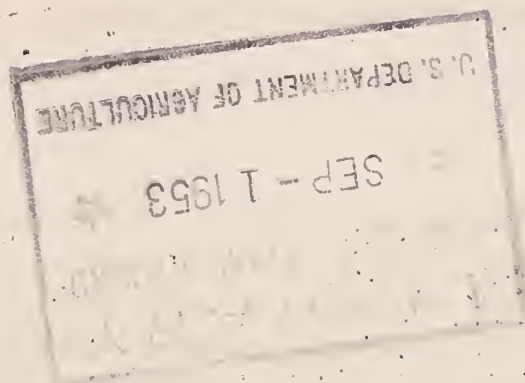
The Netherlands' exports of manufactured tobacco, with the exception of cut tobacco, has fluctuated considerably during recent years. During 1951 and 1952 annual shipments of cut tobacco averaged about 3,000,000 pounds. The principal markets were Indonesia, Belgium-Luxembourg, and Malaya. Exports of cigarettes which, during 1950 totaled 636,329,000 pieces, rose to 1,080,656,000 pieces in 1951, but dropped to 272,029,000 pieces in 1952. The principal outlets for these are Indonesia and Australia. Increased domestic manufacture in each of these countries is held responsible for the decrease. Exports of cigars and cigarillos combined increased from 55,079,000 pieces in 1950 to 79,133,000 pieces in 1951 and to 103,389,000 in 1952. The chief destinations were Belgium and Luxembourg, but Indonesia and Scandinavian countries took substantial quantities. Regardless of the recent "patchy" trade pattern, manufacturers in the Netherlands believe that the short-term outlook for their tobacco industry is good, and the long-term even better.

Stocks

Stocks of United States flue-cured, as of January 1, were reported to be on the low side. However, the recent improvement in the dollar exchange position, and the prevailing high prices for Rhodesian leaf should rectify this position somewhat.

Leaf Production

The Government has recently increased its activities at the Experimental Institute at Wageningen in connection with the production of flue-cured and light air-cured tobacco. Special attention has been given to Delcrest, a species of flue-cured tobacco believed to be of Canadian origin, and to American Gold Virginia. In addition, experiments have been tried with White Burley seed. Success has been achieved to a considerable extent, particularly as regards color, size and combustion. However, the authorities are dissatisfied with the taste which they state is not neutral enough for cigarette purposes. Plans are to persevere with these experiments but to concentrate on Delcrest flue-cured Virginia type which has shown the best results to date.





FOREIGN AGRICULTURE CIRCULAR

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SEP 23 1953
U. S. DEPARTMENT OF AGRICULTURE

FT 23-53

September 9., 1953

NORTH TEMPERATE ZONE TOBACCO PRODUCTION FORECAST INCREASES

Preliminary estimates place the North Temperate Zone harvest of leaf tobacco during 1953 at 5,504 million pounds, which would be the second largest crop in the postwar period.

This is approximately 4 percent above the revised estimate of 1952 production of 5,297 million pounds and about 25 percent above the 1935-39 prewar average. Estimated increases in production in China, Turkey and in most European countries account in a great measure for the larger forecast for 1953.

North America: Canada's tobacco crop in 1953 is forecast at 125 million pounds from 102,000 acres. Although the acreage is slightly higher than the previous year, yields are not expected to reach the exceptionally high levels of 1952.

Total tobacco production in the United States was forecast as of August 1, 1953 at 2,086 million pounds, compared with 2,255 million pounds in 1952. The decrease is due in part to smaller acreage and to a slightly lower yield per acre.

Europe: Total tobacco production in Europe in 1953, excluding the Soviet Union, is estimated at about 21 percent above the 1952 harvest, or 779 million pounds from 828,000 acres in 1953 compared with 641 million pounds from 751,000 acres in the previous year.

Soviet Union: Authentic information in tobacco production in the Soviet Union in recent years is not available, but output is estimated at about 15 percent below the prewar average of 525 million pounds.

Asia: Total tobacco production in Asia is estimated at 2,015 million pounds from 2,058,000 acres in 1953 as compared with 1,762 million pounds from 1,824,000 acres in 1952, a 14 percent increase in production. Reliable production estimates for China in 1953 are unavailable, but fragmentary reports indicate the tobacco crop at somewhat above the 1952 and prewar levels.

TOBACCO: Acreage, yield per acre, and production in specified north temperate zone countries, averages 1935-39, 1947-51, annual 1952 and 1953

Continent and Country	Acreage		Yield per acre 1/		Production	
	Average		Average		Average	
	1935-39	1947-51	1952	1953 2/	1952	1953 2/
NORTH AMERICA:						
Canada	69	113	92	102	1,103	1,144
United States	1,647	1,682	1,773	1,669	887	1,238
Estimated total 3/	1,716	1,795	1,865	1,762	-	-
EUROPE:						
Belgium	6	5	5	6	2,500	1,924
France	44	70	69	70	1,676	1,557
Western Germany 4/	33	23	25	27	2,254	2,185
Greece 4/	226	213	189	215	589	531
Italy 4/	81	142	132	131	1,173	1,178
Spain	16	28	45	50	1,100	1,244
Sweden	1	1	5/	3	1,735	1,526
Switzerland	1	3	3	3	1,571	1,844
Yugoslavia 4/	39	89	71	70	969	673
Total Western Europe	447	574	557	572	-	-
Total Eastern Europe (Incl. U.S.S.R. in Asia) 6/	221	250	214	256	-	-
Estimated total 3/	668	804	751	828	-	-
U.S.S.R. (Europe and Asia)	7/ 490	520	520	7/ 1,129	-	-
ASIA:						
Iran	32	40	40	40	1,096	754
Lebanon 8/	11	10	16	16	7/ 752	1,137
Syria 8/	(	5	7	6	(	705
Turkey	13	16	20	17	7/ 699	719
China 4/	194	304	320	388	661	638
Japan	1,228	7/ 1,402	1,250	1,400	1,021	7/ 1,017
Korea 4/	92	7/ 129	136	156	1,621	7/ 1,619
Estimated total 3/	46 7/ 1,616	42 7/ 1,948	35 7/ 1,824	35 7/ 2,058	1,252	7/ 1,117
AFRICA:						
Algeria	56	75	67	70	691	582
Tunisia	1	2	4	4	1,200	1,100
Estimated total 3/	57	77	71	74	-	-
Estimated total excluding Eastern Europe 3/	4,326	4,914	4,817	4,986	-	-
Estimated north temperate zone total 3/	4,547	5,144	5,031	5,242	-	-

1/ Some yields are calculated from detailed acreage and production estimates rather than estimates rounded to the nearest thousand. 2/ Preliminary or estimated. 3/ Totals include approximations for countries not listed where data not available. 4/ Data for 1935-39 not comparable with subsequent years. Data for 1947-51, 1952, and 1953 are for postwar areas. In the case of Germany, data for 1947-51, 1952, and 1953 are for Western Germany only. For Korea, postwar data are for South Korea only. In the case of China postwar data are for all of China except Manchuria; 1935-39 data are for Free China only. 5/ Less than 1,000 acres. 6/ Includes data for Albania, Bulgaria, Czechoslovakia, Poland, Rumania, and Hungary. 7/ Less than a 5-year average. 8/ Separate data for Syria and Lebanon not available for 1935-39.

Foreign Agricultural Service. Official estimates of foreign countries, reports from U. S. Foreign Service Officers, results of office research, and other information.

Japan's production is about 17 percent above 1952 while production in Korea is estimated about the same as in 1952 or 42 million pounds. Turkey's crop is tentatively reported at 266 million pounds from 388,000 acres or about 33 percent above the 1952 level. For all other Asiatic countries, the 1953 harvest is little changed from the previous year.

Africa: Production in 1953 in North Temperate Zone African countries is estimated to be relatively unchanged from the 49 million pounds produced in 1952.

Production, by Kinds

Flue-Cured: Output of flue-cured leaf in North Temperate Zone countries in 1953 is estimated to have decreased 4 percent to 1,838 million pounds from 1,913 million pounds in 1952 due primarily to a 95-million-pound decrease in United States production. Production in other North American countries and European and Asian countries probably either declined only slightly or remained relatively unchanged with the possible exception of Japan where, compared to 1952, production is believed to have increased 30 percent from 110 million to 143 million pounds.

Light Air-Cured:

Burley: Output of Burley leaf in 1953 is estimated at 599 million pounds, a decline of about 11 percent below 1952. This is due almost wholly to the forecast decline in United States production from 650 million to 579 million pounds. Burley leaf production in Japan is also thought to have declined substantially while production in Canada and in Italy probably increased in 1953 slightly over 1952.

Other Light Air-Cured: All other light air-cured leaf production is estimated to have increased 2 percent over 1952 to 110 million pounds. This is due in large part to almost a 1.7 million pound forecast rise in France's output.

Sun-Cured: Production of sun-cured leaf is estimated to have increased substantially from 621 million pounds in 1952 to 771 million in 1953 -- a gain of 24 percent. The increase is probably primarily due to higher output of both light and dark sun-cured tobacco in China, although reliable estimates from that country are difficult to obtain.

Dark Air-Cured: North Temperate Zone production of dark air-cured leaf in 1953 is estimated at 926 million pounds, only a slight change from 1952. Output in France and Lebanon is forecast at 9 percent more and 51 percent less, respectively, than in 1952. Production forecast in major producing countries -- China, Japan, United States, Germany -- probably changed only slightly.

Fire-Cured: Only relatively insignificant changes are forecast for fire-cured tobacco production in 1953. Output will probably total a little below 1952, due to moderate decreases in United States production of Virginia fire-cured leaf and in Italian output of Kentucky-type fire-cured leaf.

Oriental: The most significant development in 1953 in production of tobacco is in the oriental leaf sector where output is forecast at 711 million pounds, a substantial increase of 35 percent over 1952. Relatively heavy gains were made by Greece and Yugoslavia, where output increased in those countries by 49 and 53 percent, respectively. In Greece this was due largely to two factors -- a drought in 1952 which accounted for the abnormally low crop for that year -- and revaluation of the currency in 1953 which led to a general rise in prices and probably encouraged farmers to increase tobacco production. Production in Italy decreased only moderately while in all other European countries not mentioned above, it rose 38 percent. Production in Turkey increased to 266 million pounds -- a gain of 33 percent over 1952. In Lebanon, although only a relatively small producer, output doubled in 1953 to 2.5 million pounds.

PLUS-CURED TOBACCO: Estimated acreage, yield and production in north temperate zone countries, 1953 with comparisons

Continent and Country	Acreage Harvested		Yield per Acre 1/		Production	
	Average 1935-39	1947-51	1952	Average 1935-39	1947-51	1952
	1,000 acres	1,000 acres	1,000 acres	1953 2/ Pounds	1953 2/ Pounds	1953 2/ Pounds
NORTH AMERICA:						
Canada	51	98	86	1,070	1,142	1,534
United States	976	1,010	1,111	876	1,229	1,229
EUROPE:						
Germany	-	-	-	-	-	-
Italy	-	-	15	-	-	-
Bright Italia	-	-	15	-	-	-
ASIA:						
China	150	-	163	1,000	-	1,600
Japan	-	58	79	1,596	1,705	1,596
Korea	15	-	12	789	-	1,166
Total, countries shown	-	-	-	-	-	-

See footnotes at end of tables.

LIGHT AIR-CURED BURLEY TOBACCO: Estimated acreage, yield and production in north temperate zone countries, 1953 with comparisons

Continent and Country	Acreage Harvested		Yield per Acre 1/		Production	
	Average 1935-39	1947-51	1952	Average 1935-39	1947-51	1952
	1,000 acres	1,000 acres	1,000 acres	1953 2/ Pounds	1953 2/ Pounds	1953 2/ Pounds
NORTH AMERICA:						
Canada	9	8	1	1,195	1,185	1,674
United States	572	455	463	839	1,277	1,405
EUROPE:						
Italy	-	-	5	-	-	2,109
ASIA:						
Japan	-	5	2	-	1,754	1,917
Total, countries shown	-	-	-	-	-	-

See footnotes at end of tables.

OTHER LIGHT AIR-CURED TOBACCO: Estimated acreage, yield and production in north temperate zone countries, 1953 with comparisons

Continent and Country	Acreage Harvested		Yield per Acre 1/		Production	
	Average 1935-39	1947-51	1952	Average 1935-39	1947-51	1952
	1,000 acres	1,000 acres	1,000 acres	1953 2/ Pounds	1953 2/ Pounds	1953 2/ Pounds
NORTH AMERICA:						
United States	57	49	51	769	795	775
Maryland	-	-	-	-	-	-
EUROPE:						
France	-	-	-	-	-	-
Italy	-	-	-	-	-	-
Maryland	-	-	-	-	-	-
Spain	16	28	45	1,100	1,244	1,525
ASIA:						
Syria	-	-	4	-	-	693
Virginia and Burley	-	-	-	-	-	-
Total, countries shown	-	-	-	-	-	-

See footnotes at end of tables.

SUN-CURED TOBACCO: Estimated acreage, yield and production in north temperate zone countries, 1955 with comparisons

Continent and Country	Acreage Harvested		Yield per Acre 1/		Production	
	Average 1935-50	1952	Average 1947-51	1952	Average 1947-51	1952
AFRICA:						
Algeria	1,000 acres	1,000 acres	1,000	Pounds	1,000 pounds	1,000 pounds
ASIA:						
China	-	9	-	600	-	5,194
Light	491	500	-	1,000	-	500,000
Dark	86	87	-	1,000	-	87,500
Korea	-	-	-	-	-	-
Native	51	27	1,144	1,057	55,465	24,000
Total, countries shown	-	-	-	-	-	620,694
						770,700

See footnotes at end of tables.

FIRE-CURED TOBACCO: Estimated acreage, yield and production in north temperate zone countries, 1955 with comparisons

Continent and Country	Acreage Harvested		Yield per Acre 1/		Production	
	Average 1935-50	1952	Average 1947-51	1952	Average 1947-51	1952
NORTH AMERICA:						
United States	1,000 acres	1,000 acres	1,000	Pounds	1,000 pounds	1,000 pounds
Virginia Fire-cured	23	10	1,165	1,250	13,005	12,250
Ky.-Tenn. Fire-cured	105	50	1,124	1,185	56,003	45,967
EUROPE:						
Italy	-	-	-	-	-	-
Kentucky	-	27	-	1,349	-	35,069
Sub-tropical	-	4	-	1,386	-	5,952
Total, countries shown	-	-	-	-	-	100,016
						99,274

See footnotes at end of tables.

ORIENTAL TOBACCO (including semi-oriental): Estimated acreage, yield per acre, and production in north temperate zone countries, 1955 with comparisons

Continent and Country	Acreage Harvested		Yield per Acre 1/		Production	
	Average 1935-50	1952	Average 1947-51	1952	Average 1947-51	1952
EUROPE:						
Greece	224	189	509	462	113,320	86,954
Italy	-	62	-	405	-	30,102
Semi-oriental	39	71	969	460	59,622	32,705
Yugoslavia	221	224	955	696	220,321	156,000
Other Europe 5/	11	16	752	629	11,728	11,023
ASIA:						
Iran	6	4	474	350	-	1,253
Lebanon	-	0	-	895	-	8,294
Bulgaria	180	510	680	645	103,759	200,939
Syria - Abu Kitha-l-Jakkla	-	-	-	-	-	-
Turkey	-	-	-	-	-	-
Total, countries shown	-	-	-	-	-	526,450
						710,588

1/ Yields are calculated from detailed acreage and production rather than estimates rounded to the nearest thousand. 2/ Preliminary. 3/ Less than a 5-year average. 4/ Less than 500.

5/ Includes Albania, Bulgaria, Czechoslovakia, Hungary, Poland and Rumania.

Foreign Agricultural Service. Official estimates of foreign countries, reports from U. S. Foreign Service Officers, results of office research and other information.

DARK AIR-CURED (including cigar): Estimated acreage, yield and production in north temperate zone countries, 1953 with comparisons

Continent and Country	Acreage Harvested			Yield per Acre 1/			Production		
	1935-39	1947-51	1952	1935-39	1947-51	1952	1935-39	1947-51	1952
	1,000 acres	1,000 acres	1,000 acres	Pounds	Pounds	Pounds	1,000 pounds	1,000 pounds	1,000 pounds
NORTH AMERICA:									
Canada *	9	7	5	1,243	1,121	1,080	11,191	7,759	5,402
United States									
One Sucker	21	17	15	844	1,138	1,348	17,735	19,228	20,090
Green River	19	10	8	838	1,082	1,250	15,788	11,147	10,020
Virginia Sun-cured	3	3	3	844	1,012	1,100	2,769	3,330	3,740
Cigar filler	42	43	29	1,273	1,517	1,550	53,575	64,583	44,795
Cigar binder	34	40	31	1,452	1,536	1,539	47,836	61,065	48,311
Cigar wrapper	10	14	13	955	1,064	1,125	9,108	15,233	14,508
Perique	4/	1	4/	454	646	600	192	323	180
EUROPE:									
Belgium	6	5	5	2,500	1,924	2,150	16,431	9,432	12,050
France	-	-	-	-	-	-	-	109,070	102,775
Germany *	-	-	-	-	-	-	-	-	43,524
Italy	-	-	-	-	-	-	-	-	-
Beneventano	-	-	7	-	-	1,037	-	-	7,540
Nostrano	-	-	8	-	-	1,400	-	-	11,067
Sweden	1	1	4/	1,735	1,526	1,516	1,061	859	622
Switzerland	1	3	3	1,571	1,844	1,940	2,276	4,689	4,850
ASIA:									
Iran	-	-	-	-	-	-	-	-	-
Cigarette	-	-	21	-	-	970	-	-	20,373
Pipe	-	-	6	-	-	867	-	-	5,201
Tombac (water pipe)	-	-	3	-	-	359	-	-	4,078
Lebanon	-	-	3	-	-	800	-	-	2,585
China *	491	-	500	1,047	-	800	514,000	-	402,500
Syria	-	-	-	-	-	-	-	-	-
Shak al Bent	-	-	9	-	-	591	-	-	5,214
Hasan Kayf	-	-	4/	-	-	700	-	-	35
Tombac	-	-	1	-	-	820	-	-	800
Turkey	6	6	10	640	500	580	386	370	580
Japan	-	66	55	-	1,505	1,732	-	112,223	95,259
AFRICA:	-	-	-	-	-	-	-	-	-
Algeria	-	-	58	-	-	690	-	-	40,000
Tunisia	1	2	4	900	900	900	1,202	2,203	3,600
Total, countries shown	-	-	-	-	-	-	-	-	909,659
									926,262

* Includes cigar

See footnotes at end of tables.



FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT 24-53

September 25, 1953

UNITED STATES EXPORTS OF MANUFACTURED TOBACCO

For several years, large importers of U. S. tobacco leaf have been turning to non-dollar areas for their tobacco, while exports of manufactured tobacco appear to have stabilized or to be increasing over the same period.

United States exports of tobacco products in the first 6 months of 1953, with the exception of chewing tobacco, increased substantially over the same period in 1952. Total dollar value of exports increased by 4.3 million dollars to \$32.2 million and has already exceeded the half-yearly value figure based on the 5-year postwar average. Largely responsible for the increase is (1) the continually increasing number of American tourists abroad who demand American tobacco products, and (2) greater availability of U. S. dollars abroad.

Total value of United States exports of tobacco products during calendar year 1952 increased slightly over the previous year, 57.2 million dollars as compared with 56.7 million dollars in 1951, and were more than five times greater than prewar yearly average. Average value of total tobacco products exported in the 5-year period ending 1952 was \$58.2 million compared with \$10.8 million exported during the 5-year prewar period.

Cigarettes

During January-June 1953, total cigarette exports increased by 8 percent -- 625 million pieces -- over the comparable period in 1952. During this six-month period, exports to North and South America in 1953 only changed slightly from the same period in 1952, while takings by Europe increased by roughly 200 million pieces. The biggest increase was in exports to Spain which amounted to almost one quarter of a billion pieces in January-June 1953 and which were almost non-existent in the same period of 1952. Spain's takings for this period are an all-time high. On the other hand, during the same six-month period, exports to Switzerland dropped almost 56 percent from the more than 400 million pieces exported in January-June 1952.

During 1952, United States cigarette exports had declined by about 456 million pieces (almost 3 percent) compared to 1951, but still were almost $3\frac{1}{2}$ times the 1934-38 average. Exports to Asia decreased by 32 percent, or 1,368 million pieces. In this area, during 1952 Palestine and Trans-Jordan, Philippine Islands, Hong Kong, and British Malaya reduced their takings by 34, 43, 41, and 45 percent, respectively, compared to 1951; on the other hand, exports to Oceania increased by about 36.8 million pieces over 1951, a rise of more than 77 percent.

Cigars and Cheroots

Total exports of cigars and cheroots increased to 2.9 million pieces from the 1951 figure of 2.6 million, while value rose by 436 thousand dollars to 2.5 million dollars. This was the highest figure reached since prewar. Average cigar and cheroot exports in 1948-52 were almost three times the average for 1934-38. Exports during the first six months of 1953 also rose sharply over the same period in 1952, possibly indicating a higher total for 1953 than 1951, when exports were the highest in the postwar period except for the unsettled years 1947 and 1948.

Chewing, Plug and Other

Total exports of chewing, plug and other similar tobacco products in 1952 were the highest since 1949, due to larger takings by the Philippines and Australia. Exports during the first six months of 1953, however, were more than 250 thousand dollars less than the same period in 1952 and possibly point up lower total exports for 1953. A brighter aspect is shown in the 1948-52 average which is 20 percent higher than the 1934-38 average.

Smoking Tobacco

Except for 1946, exports of smoking tobacco in 1952 were the largest in both the prewar and postwar periods. Exports to the Philippine Islands increased by 93 percent compared to 1951 and total shipments to countries not listed rose by more than 12 percent. The six months period ending June 1953 was well ahead -- 78 percent -- of the same period in 1952, and there are indications that exports by the end of 1953 will be measurably ahead of 1952.

Comparison of the Exports of Manufactured Tobacco Products

	Average		Average		January - June		
	1934-38		1948-52		1952	1953	
	Quantity:	Value:	Quantity:	Value:	Quantity:	Value:	Quantity: Value
Cigarettes (million pieces)	4,774	9,058	18,436	54,730	16,352	54,754	7,773 26,005 8,399 29,574
Cigars and cheroots (1,000 pieces)	8,201	435	5,112	353	3,273	177	1,300 69 2,704 144
Chewing tobacco (1,000 pounds)	1,787	708	2,142	1,434	1,920	1,547	1,003 784 599 512
Smoking tobacco (1,000 pounds)	967	601	2,344	1,720	2,864	2,455	1,289 1,063 2,298 1,982
Total value		10,802		58,237		58,933	
							27,921 32,212

Compiled in Foreign Agricultural Service

Cigarettes: Exports by country, average 1934-38, 1948-52, annual 1952,
and January-June 1952 and 1953

Continent and Country	Average		1952	January - June	
	1934-38	1948-52		1952	1953
	pieces	pieces	pieces	pieces	pieces
North America					
Iceland	106:	51,852:	78,780:	30,810:	93,600
Canada	11,865:	(335,626:	(533,109:	(229,384:	(238,109
Newfoundland & Labrador ...:	6,466:				
Miquelon & St. Pierre	6,119:	2,952:	1,580:	-	2,770
Mexico	30,776:	294,061:	165,994:	78,532:	78,815
Costa Rica	28,528:	28,068:	24,349:	9,759:	12,430
Panama Republic	(388,844:	471,867:	644,823:	308,737:	285,626
Panama Canal Zone		213,977:	172,302:	75,794:	90,910
Bermuda	29,804:	59,962:	66,494:	28,700:	30,993
Cuba	46,834:	329,355:	396,126:	185,765:	174,069
Haiti	19,147:	73,221:	62,192:	28,400:	15,840
Curacao (Netherlands					
West Indies)	105,226:	-	-	-	-
Netherlands Antilles	-	1,019,092:	846,495:	427,157:	425,555
Other	42,029:	88,738:	100,572:	52,339:	52,525
Total North America	715,744:	2,968,771:	3,092,816:	1,455,377:	1,501,242
South America					
Colombia	90,778:	242,551:	260,524:	105,339:	141,939
Venezuela	38,688:	1,181,296:	1,570,147:	861,388:	685,284
Ecuador	6,698:	126,837:	185,400:	115,260:	106,106
Peru	10,454:	62,730:	57,720:	26,730:	55,360
Uruguay	7,804:	148,431:	180,836:	105,556:	62,342
Argentina	63,643:	13,199:	3,595:	1,205:	2,780
Other	8,827:	29,740:	38,020:	18,980:	19,115
Total South America	226,892:	1,804,784:	2,296,242:	1,234,458:	1,072,926
Europe					
Sweden	79,755:	509,259:	654,400:	304,880:	390,360
France	307,224:	383,530:	851,737:	381,990:	511,776
United Kingdom	98,754:	27,879:	28,895:	23,065:	26,920
Netherlands	127,916:	205,342:	255,930:	106,650:	143,130
Ireland	203:	10,777:	17,130:	6,810:	10,400
Belgium	63,404:	984,680:	813,690:	268,430:	502,720
Switzerland	16,235:	717,248:	700,669:	400,757:	216,740
Spain	15,595:	7,264:	990:	430:	245,923
Portugal	4,686:	27,674:	16,600:	10,570:	9,120
Italy	33,500:	375,035:	401,315:	185,280:	160,191
Other	142,692:	1,540,119:	1,298,457:	637,580:	814,790
Total Europe	889,964:	4,788,807:	5,039,813:	2,326,442:	3,032,070

Continued -

Cigarettes: Exports by country, average 1934-38, 1948-52, annual 1952,
and January-June 1952 and 1953 - Continued

Continent and Country	Average		1952	January - June	
	1934-38	1948-52		1952	1953
	1,000	1,000	1,000	1,000	1,000
	pieces	pieces	pieces	pieces	pieces
Asia					
Iraq	648:	1,170:	-	-	-
Palestine & Trans-Jordan ...	2,373:	26,848:	13,540:	7,290:	11,080
French Indochina	15,148:	10,104:	5,600:	3,150:	2,200
Netherlands Indies	15,844:	68,693:	61,600:	38,900:	5,031
Philippine Republic	2,543,597:	4,486,121:	692,837:	536,577:	255,155
China	84,233:	2,276:	-	-	-
Hong Kong	22,159:	952,420:	709,512:	309,422:	425,577
British Malaya	2,554:	475,709:	639,268:	277,200:	218,220
Other	46,684:	569,311:	755,399:	325,701:	502,785
Total Asia	2,732,240:	6,592,652:	2,877,756:	1,498,240:	1,420,048
Oceania					
Australia	19,011:	2,907:	8,820:	770:	3,181
New Zealand	17,589:	4,628:	3,160:	930:	-
French Oceania	23,429:	-	-	-	-
French Pacific Islands	-	37,124:	45,480:	24,070:	20,460
Other	730:	9,875:	26,756:	11,754:	12,138
Total Oceania	60,759:	54,534:	84,216:	37,524:	35,779
Africa					
Algeria	(15,120:	1,310:	560:	280:	200
Tunisia	4,050:	4,050:	8,800:	2,500:	4,300
Canary Islands	37,572:	42,413:	9,850:	5,850:	6,800
Libya	-	-	-	-	-
Union of South Africa	3,475:	38,511:	8,161:	2,465:	365
Egypt	33,847:	111,493:	109,959:	53,989:	79,115
Belgian Congo	522:	173,782:	188,460:	70,250:	78,810
Tangiers	-	1,468,720:	2,129,920:	827,209:	932,600
Other	57,531:	386,642:	504,966:	258,764:	234,619
Total Africa	148,067:	2,226,921:	2,960,676:	1,221,307:	1,336,809
Total quantity	4,773,666:	18,436,469:	16,351,519:	7,773,348:	8,398,874
Total value					
1,000 dollars	9,058:	54,730:	54,754:	26,005:	29,574

Source: Compiled from records of the Bureau of Census in Foreign Agricultural Service.

United States exports of cigars and cheroots, chewing and smoking tobacco,
average 1934-38, 1948-52, annual 1952, January-June 1952, 1953

Continent and Country	Average		1952	January - June	
	1934-38	1948-52		1952	1953
	1,000	1,000	1,000	1,000	1,000
	<u>pieces</u>	<u>pieces</u>	<u>pieces</u>	<u>pieces</u>	<u>pieces</u>
Cigars and cheroots					
North America					
Greenland	-	-	-	-	-
Iceland	3:	1:	5:	-	-
Panama Republic	1,111:	502:	538:	258:	183
Panama Canal Zone	-	899:	926:	426:	453
Bermuda	25:	70:	-	-	185
Other countries	444:	298:	242:	81:	1,118
Total North America	1,583:	1,770:	1,711:	765:	1,939
South America					
Total South America	169:	72:	105:	47:	10
Europe					
Germany	182:	1,245:	-	-	-
United Kingdom	2,176:	16:	2:	-	-
Spain	1:	1:	1:	1:	-
Italy	2,514:	4:	-	-	-
Other countries	367:	274:	309:	16:	127
Total Europe	5,240:	1,540:	312:	17:	127
Asia					
Total Asia	219:	1,078:	590:	51:	339
Oceania					
Total Oceania	321:	12:	33:	5:	24
Africa					
Egypt	67:	23:	8:	8:	-
Union of South Africa	553:	502:	430:	350:	235
Other countries	49:	115:	84:	57:	30
Total Africa	669:	640:	522:	415:	265
Total quantity	8,201:	5,112:	3,273:	1,300:	2,704
Total value					
1,000 dollars	435:	353:	177:	69:	144
	1,000	1,000	1,000	1,000	1,000
	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>
Chewing, plug, and other 1/					
Newfoundland & Labrador ...	201:	59:	28:	14:	12
Panama	141:	139:	119:	59:	50
United Kingdom	147:	38:	28:	14:	7
Philippine Republic	609:	833:	788:	459:	51
Australia	516:	732:	840:	379:	404
Other countries	173:	341:	117:	78:	75
Total quantity	1,787:	2,142:	1,920:	1,003:	599
Total value					
1,000 dollars	708:	1,434:	1,547:	784:	512

Continued -

United States exports of cigars and cheroots, chewing and smoking tobacco, average 1934-38, 1948-52, annual 1952, January-June 1952, 1953 - Continued

Continent and Country	Average		1952	January - June	
	1934-38	1948-52		1952	1953
	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds
Smoking 2/					
U.S.S.R.	-	-	-	-	-
Canada	49:	(252:	(237:	(116:	(129
Newfoundland & Labrador	83:				
Argentina	268:	146:	-	-	-
United Kingdom	102:	14:	14:	10:	8
Philippine Republic	64:	244:	585:	226:	782
Other countries	401:	1,688:	2,028:	937:	1,379
Total quantity	967:	2,344:	2,864:	1,289:	2,298
Total value					
1,000 dollars	601:	1,720:	2,455:	1,063:	1,982

1/ Snuff included 1948 on.

2/ Includes smoking tobacco in packages and bulk.

Source: Compiled from records of the Bureau of Census in Foreign Agricultural Service.

UNITED STATES: Exports of Tobacco Products

Product and Area	Average 1934-38	Average 1948-52	1952	January - 1952	June 1953
	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces
<u>Cigarettes</u>					
North America	715,744	2,968,771	3,092,816	1,455,377	1,501,242
South America	226,892	1,804,784	2,296,242	1,234,458	1,072,226
Europe	889,964	4,788,807	5,039,813	2,326,442	3,032,070
Asia	2,732,240	6,592,652	2,877,756	1,498,240	1,420,048
Oceania	60,759	54,534	84,216	37,524	35,779
Africa	148,067	2,226,921	2,960,676	1,221,307	1,336,809
Total	4,773,666	18,436,469	16,351,519	7,773,348	8,398,874
Value \$000	9,058	54,730	54,754	26,005	29,574
<u>Cigars & Cheroots</u>					
North America	1,583	1,770	1,711	765	1,939
South America	169	72	105	47	10
Europe	5,240	1,540	312	17	127
Asia	219	1,078	590	51	339
Oceania	321	12	33	5	24
Africa	669	640	522	415	265
Total	8,201	5,112	3,273	1,300	2,704
Value \$000	435	353	177	69	144
<u>Chewing Tobacco</u>					
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Total	1,787	2,142	1,920	1,003	599
Value \$000	708	1,434	1,547	784	512
<u>Smoking Tobacco</u>					
Total	967	2,344	2,864	1,289	2,298
Value \$000	601	1,720	2,455	1,063	1,982
Grand Total Value	10,802	58,237	58,933	27,921	32,212

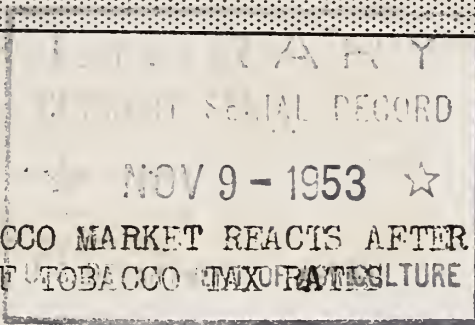
Prepared by Foreign Agricultural Service.



FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT 25-53



October 28, 1953

WEST GERMAN TOBACCO MARKET REACTS AFTER ADJUSTMENT OF TOBACCO TAX RATES

Summary

Consumer resistance to high retail tobacco prices, and pressure from West German manufacturers caught between rising production costs and fixed retail prices were the major factors behind the reduction in tobacco tax rates which took place on June 8, 1953. Retail prices were reduced 14 percent on the average while across-the-board tax reductions averaged 26 percent. During the two months following the reduction in retail prices, total consumption of all manufactured tobacco products increased about 20 percent. The West German trade believes that consumption will either remain at current levels or continue to rise. The trade estimates that raw leaf imports will increase by 11,000 metric tons (24.3 million pounds), primarily cigarette tobacco, and that about 45 percent of these additional import requirements will come from the United States. A substantial portion of the remaining 55 percent will probably be obtained from Oriental-producing countries (Turkey and Greece).

Prior to the recent reduction in tobacco tax rates, retail prices for manufactured tobacco were almost three times the prewar level, as a result of substantially higher taxes. Consumer complaints were vigorously backed by manufacturers who were faced with rising production costs and fixed retail prices.

In spite of fears that lower tobacco taxes would result in a loss to the German treasury of about 100 million Deutsche Marks (\$23.8 million), recent data indicate that consumption during the two months following the reform was about 20 percent over average monthly consumption during early 1953 and 1952. The German Federal Bureau of Statistics calculated that the overall price level for tobacco products in Western Germany dropped 14 percent since the tax reform. The fact that index figures for value of total retail tobacco sales during June and July in the following table remained constant is indicative of a proportionate increase in quantities of tobacco products sold. Total sales in July 1953 are estimated to be 20 percent above July 1952.

Prepared from a report submitted by the American Consulate General in Bremen, Germany.

TOBACCO: Retail sales in Western Germany
Index of total sales values 1/
(Monthly average 1950 = 100)

Year total 1951	104
Year total 1952	108
March 1953	104
April 1953	109
May 1953	106
June 1953	106
July 1953	107

1/ Separate sales index figures for cigars, cigarettes, smoking tobacco etc., are not available.

Moreover, judging from postwar per capita consumption figures which are still substantially below prewar, it appears that there is room for a sizeable increase in consumption.

TOBACCO PRODUCTS: Per capita consumption in the German Federal Republic

Fiscal Year <u>1/</u>	Cigarettes	Cigars	Smoking Tobacco <u>2/</u>
	<u>Pieces</u>	<u>Pieces</u>	<u>Grams</u>
1938/1939 <u>3/</u>	692	133	468
1949/1950	470	47	452
1950/1951	498	81	430
1951/1952	586	85	421
1952/1953 <u>4/</u>	633	89	370

1/ April 1 - March 31.

2/ German Reich.

3/ Estimated.

4/ The decline in consumption of smoking tobacco is mainly due to decreased sales of pipe tobacco included under this heading. Prewar figures are for the German Reich. The largest outlet for pipe tobacco was the eastern part of Germany, now in Soviet zone and under Polish administration. A slight decline has also been observed in fine cut tobacco chiefly used for roll-your-own cigarettes. This is explained by growing consumer preference for machine-made cigarettes.

Source: Statistisches Jahrbuch - Federal Republic - 1953.

Though admittedly a short period for comparison, production of manufactured tobacco during June and July following the tax reform increased substantially. June output was exceptionally high to make up for a slack in production during May, when manufacturers slowed down in anticipation of the new tax reform, and to fill up distributive channels and retail outlets. The trade feels that the July level might possibly reflect the new "normal". Compared to the first four months of 1953, July production of cigarettes increased 28.4 percent. For the same period, production of smoking tobacco increased 20 percent while that of cigars rose by about 9.5 percent. The rise in cigar production is probably to refurnish stocks. A significant rise in consumption of cigars is not expected since retail prices for this product have not been reduced.

Since the tobacco tax reform the number of cigarette brands marketed in Western Germany has risen from 129 to 161. The bulk of this increase was brought about by the introduction of a new tobacco tax law under which each manufacturer may produce 15,000,000 cigarettes per month at a preferential rate. Few manufacturers have taken advantage of the preferential rate, however, due to the added expense of marketing a relatively small number of cigarettes under a separate brand name. The arrangement was intended to support small producers. Output of cigarettes in the preferential tax bracket is limited to approximately 200 million cigarettes per month or about 6 percent of total West German cigarette production. These are selling at a retail price of 7-1/2 Pfennigs (1.8 U.S. cents) each instead of 8-1/3 Pfennigs (2.0 U. S. cents) for brands in the normal tax grade produced by the larger factories. Likewise, the manufacturers of smoking tobacco may each produce 500 kilograms (1,102 pounds) of preferential low-taxed smoking tobacco. The total monthly output of this product will probably amount to 70 or 80 tons (154,322 pounds - 176,368 pounds). It will sell retail for DM 24 per kilogram (\$2.59 per pound) instead of 27 DM (\$2.92 per pound), which is the lowest price bracket for large-scale producers. Cigarettes and smoking tobacco under this preferential tax are not subjected to any restrictions with regard to the use of foreign tobacco leaf.

Recent tobacco market reviews generally report that sales of the 7.5 Pfennigs (1.79 U.S. cents) tax-favored cigarettes are not meeting expectations. It is estimated that their share in total cigarette sales declined from about 7 percent in June to about 5 percent in July 1953. This may be attributed largely to a lack of advertising by manufacturers of such cigarettes. The sales of the brands of cigarettes in this tax category are almost invariably restricted to rather small areas centered around the places where they are produced.

Cigarettes priced at 10 Pfennigs (2.38 U.S. cents) before June 8, 1953, are now selling at 8-1/3 Pfennigs (2 U.S. cents). It is estimated that 82 percent of all cigarettes smoked in Western Germany are in this price bracket. The number of brands in this class has been reduced substantially. Large-scale producers are now concentrating on fewer but more widely advertised brands. Since the tax reduction, sales in the 10 Pfennigs (2.38 U.S. cents) class (12 and 12.5 Pfennigs (2.86 and 2.97 U.S. cents) before June 8) are reported increased until they accounted for about 12 percent of total cigarette consumption in July 1953, as compared with only 5 percent during the fiscal year 1952-53.*

* April 1 - March 31.

There is a notable increase in the consumption of straight Oriental blends, although the American blends are still dominating the market. Before June 8, 1953, 26 percent of all brands marketed were Oriental types. These types account for 33 percent since the tobacco tax reform. While consumption of straight Oriental type cigarettes was estimated at 2 percent in 1952, recent marketing reports state that sales have risen to about 7 percent of entire West German cigarette consumption.

The recent increase in consumption of cigarettes made from straight Oriental tobacco could indicate changing consumer taste. Before World War II about 96 to 97 percent of all cigarettes smoked in the German Reich were straight Oriental types. Part of the recent upswing of Oriental brands, however, is probably due to price developments after the tobacco tax reform. The bulk of popular Oriental brands is now selling in the 10 Pfennigs (2.38 U.S. cents) bracket, instead of 12.5 Pfennigs (2.97 U.S. cents) as before June 8. This is a reduction of 25 percent as compared with a decrease of 16.7 percent of the price of brands in the 8-1/3 Pfennig (1.98 U.S. cents) class which accounts for the bulk of American-blend brands. By reducing retail prices from 12.5 to 10 Pfennigs, (2.97 to 2.38 U.S. cents) in line with the tax decrease manufacturers have attained a significantly larger volume of sales in this price bracket.

In 1952 Western Germany imported a total of 51,443 tons (113,412,000 pounds) of leaf tobacco. It is estimated that as a result of the tax and price reductions and the 20 percent rise in consumption that U.S. exports of leaf tobacco to Western Germany will increase by about 4,950 tons (10.8 million pounds) per year. Dollars for imports of cigarette and smoking tobacco are said to be available. The intended purchases of U. S. cigar leaf tobacco have not been made previously, largely because of sharp price rises. It is intended to use these funds for increased imports of cigarette leaf tobacco from the USA.



FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
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FT 26-53

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CURRENT MISCELLANEOUS TOBACCO DEVELOPMENTS IN TURKEY, INDONESIA PAKISTAN, HUNGARY, KOREA, HOLLAND, AND CUBA

Tobacco Production in Turkey Estimated At or Near All-time High

Total production of tobacco in Turkey may reach a new high this year. Plantings were increased as a consequence of last year's favorable market which enabled producers and merchants to dispose of practically all marketable stocks at relatively good prices. Production in Turkey has been rising rapidly in recent years, especially since 1945. This year's crop is expected to exceed that of 1952 but firm estimates are not yet available to indicate how it compares with the unusually large crops of 1946 (216 million pounds) and 1949 (269.0 million pounds).

TURKEY: - Domestic production and consumption of tobacco

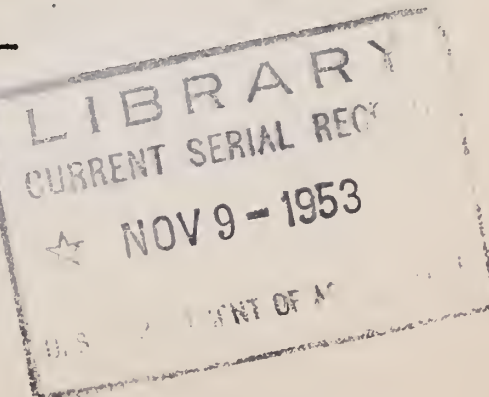
	Average					
	1935-39	1940-44	1945-49	1950	1951	1952
	Million	Million	Million	Million	Million	Million
	pounds	pounds	pounds	pounds	pounds	pounds
Production	128.5	133.0	191.5	187.3	180.8	200.6
Consumption	28.7	37.0	39.8 ^{1/}	^{2/}	^{2/}	46.3

^{1/} 1946 and 1947.

^{2/} Not available.

TURKEY: - Exports of leaf tobacco in 1952 by country of destination (Excludes 2.2 million pounds of waste)

Country	Quantity
	Million pounds
United States	51.7
Germany, West	20.8
Germany, East	3.1
Russia	5.8



TURKEY: -- Exports of leaf tobacco in 1952
by country of destination (cont'd.)

Country	Quantity
	Million
	pounds
Hungary	5.7
Belgium	5.5
Egypt	4.5
Austria	4.1
Great Britain	3.7
Italy	3.2
Switzerland	2.8
Finland	2.5
France	2.2
Others	7.6
Total	123.2

Sharp Reduction in Production of
Virginia Flue-cured in East Java

Current reports from East Java indicate a sharp decrease in the production of Virginia flue-cured tobacco this year. Due to unseasonable rains this year's crop is estimated at about 1,653,000 pounds as compared to around 6,614,000 pounds in 1952.

The Department of Agriculture is asking for more information on current estimates of Indonesian production as this could be a significant factor in level of United States exports to that country.

Indonesia does not produce enough Virginia-type tobacco to meet domestic needs. About 70 percent of the Virginia tobacco required for the Indonesian cigarette industry is imported. In 1952, Indonesia imported 7,154 metric tons (about 15.8 million pounds) of this type of tobacco from the United States. They are attempting to become self-sufficient in this type through encouraging increased production. However, the Indonesians are experiencing difficulties (especially those due to unfavorable soil and climate) in their efforts to produce high-quality Virginia tobacco.

Import quotas of Virginia tobacco are restricted to the minimum amounts required to supplement domestic production. All cigarettes manufactured in Indonesia must contain a minimum stipulated percentage of locally-grown tobacco. The percentage "required" depends on the grade of cigarette. The minimum percentages were to be increased in 1953, however, actual availability of stocks will largely determine the mixtures used.

INDONESIA: - Imports of Leaf Tobacco

Leaf	1948	1949	1950	1951	1952
	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds
United States	6,473	7,599	6,729	12,723	15,772
Canada	-	-	134	-	-
India	1,512	-	2,000	1,863	1,568 1/
Other	-	2	2	2	4 1/
Total	7,985	7,601	8,865	14,588	17,344

1/ First 6 months of 1952.

Most of the Indonesian imports of leaf tobacco from the United States is flue-cured. They do import some dark air-cured (287,000 pounds Green River, 1952), some dark fire-cured (87,000 pounds Kentucky-Tennessee, 1952) and a little Burley. Most of their other leaf imports come from India. Cut tobacco, cigarettes, and cigars are imported mostly from the Netherlands, the United States, and the United Kingdom, with increased amounts coming from the United States and the United Kingdom in recent years. Total imports of manufactured tobacco amounted to about 3.3 million pounds in 1950 and 3.1 million pounds in 1951.

Only a small proportion of Indonesian production is of Virginia flue-cured and its production is a relatively recent development. However, due to the ever increasing demand for cigarettes greater emphasis is being given to this type. Most of the flue-cured production is in the Besuki area of East Java, the Celebes, and other areas. Deli cigar tobacco, especially wrapper (East Coast of Sumatra); Vorstenlander wrapper (Central Java); Besuki wrapper, binder, and filler (East and Central Java); and Krossok (concentrated in Besuki area of Java and Madura -- dry weather type used for pipe tobacco and the domestic manufacture of cigarettes and wet weather or irrigated type for cigars) have long accounted for the bulk of Indonesian production and exports. In terms of total production, tobacco growing is largely concentrated in East and Central Java, Madura (Madoera) and Sumatra but some is also grown in West Java, Bali, Lombok, South Celebes, and other areas. Total production of all types of tobacco is now only a little more than half that of the late 1930's and early 1940's. The production was about 111.4 million pounds in 1952 and 128.7 million pounds in 1951 as compared to 222.7 million for 1939-40.

Pakistan Relaxes Tobacco
Export Controls

On September 22, the Pakistan Government announced some relaxation in tobacco export regulations. No license is now required for the export of tobacco of Pakistan origin of the following type: tobacco (raw) - other than Virginia type - cigars and cigar wrapper leaf from East Pakistan only. A license is necessary for exports from West Pakistan.

Raw Virginia type tobacco and manufactured tobacco products other than bidis, cigarettes, cigars, and snuff may be exported against licenses which will be granted freely to all exporters concerned.

Hungary Exports to France
Year June 1952-53

A one-year trade agreement beginning June 1, 1953, between France and Hungary provides for Hungarian exports of 1,323,000 pounds of tobacco to France. About 275,000 pounds will go to Algeria and Tunisia and 275,000 to the Associated States (Cambodia, Vietnam and Laos).

Korean Tobacco Production
Estimates Increased for 1953

Korean production for 1953 is estimated at about 39.5 million pounds as compared to 37.2 million pounds in 1952. The highest production ever reached was about 84 million pounds, while the 1946-52 average was around 37.5 million.

The tobacco producing areas are in the central section of South Korea. Three government factories manufacture practically all cigarettes and pipe tobacco. Two of them are at Chongju and one is in Taegu.

Of the cigarette machines used, 16 are of United States manufacture, one Korean, and the remainder, Japanese. All of the tobacco cutting machines were made by the Japanese.

Tobacco coming into the factories is in burlap wrapped bags and is pressed into blocks for the cutting machines. The processing of tobacco for cigarettes seems to be the same as for that used in pipes.

Locally produced cigarettes retail for 8 to 15 cents per pack of 20 as compared to 30 cents for American cigarettes on the black market. Both types appear to be in plentiful supply.

Preference for American type blended cigarettes is widespread.

Holland Lifts Import Restrictions on Tobacco and
Many other Agricultural Products from Dollar Areas

Following the announcement in early September of intentions to liberalize dollar imports, a list of goods was published on whose import from the dollar area after October 15 will no longer be subject to quantitative restrictions. In practice, the trade will make out its own import forms which will be approved automatically by the licensing officials for the quantities of goods desired.

The free group includes many agricultural commodities such as tobacco, raw or manufactured, and waste thereof; corn; raw cotton and bleached cotton linters; sugar; sisal, cantata and manila; broom corn; animal hair and bristles; and various types of hardwoods. This list also contains many other raw materials, as well as semi-manufactures and capital goods. Their re-export is prohibited. The lifting of quantitative restrictions are applicable to imports from most South and Latin American countries, Mexico, United States, Canada, and the Philippines. There are lists for two other categories of goods which are still under quantitative restrictions but for which a more liberal policy of granting import licenses has been put into effect.

The old system of separate requests for dollar import licenses will be replaced by a more flexible system regarding imports from Organization for European-Economic Cooperation countries.

The Netherlands Bank has withdrawn the peg of 3.795 guilders at which it is used to buy dollars on the free market. The banks have ample funds and are in an exceedingly liquid position, thus it may now be easier to secure exchange for dollar purchases.

Higher Production Quota Established by the Cuban Ministry
of Agriculture for the 1953-54 Sun-Grown Tobacco Crop

On September 12 the Cuban Ministry of Agriculture set a maximum domestic production quota of 800,000 quintals (81,144,000 pounds) of sun-grown for the 1953-54 crop. This limit is 2.5 million pounds higher than the 1952-53 sun-grown quota established in September 1952. In July 1952, the 1952-53 crop limit was set at 65.9 million pounds but was later revised upward in anticipation of increased leaf exports.

The current crop may reach 80 million pounds but official estimates are not yet available.

No limit is established on the production of shade-grown.

In 1951 and 1952, exports of unmanufactured Cuban leaf were higher than for any period in the last decade, with the exception of 1946. Cigar exports in 1951 and 1952 were also substantially above the low levels of 1949 and 1950. Recent upward trends in exports and the belief that strong export demand will continue are important factors in establishing the level of production quotas.

The largest importers of Cuban leaf and tobacco products are the United States (about 70 to 75 percent of the value of all exports in 1951 and 1952) Spain, France, Uruguay, and Canada. If production quota levels are attained, importers of Cuban tobacco and tobacco products will be assured ample supplies. On the other hand, realization of the indicated production quota would bring about increased competition for market outlets of certain types of tobacco products of the United States.



FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT 27-53

November 9, 1953

GREECE - TOBACCO PRODUCTION AND TRADE

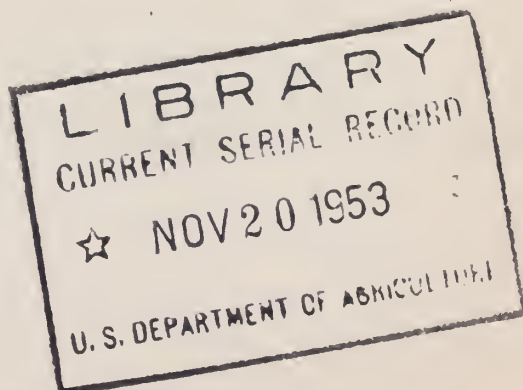
PRODUCTION

Weather Conditions. In general weather conditions during 1953 were favorable for tobacco production. Rains during June and July caused abnormal and irregular growth of the first leaves harvested and resulted in a lower quality of the first 3 pickings. However, from July 15, through harvest time, the sunny and dry weather was excellent for quality production.

Harvesting. Because of the mild summer, harvesting started about 10 days later than usual. With a few exceptions in the mountainous areas the harvesting of tobacco was completed by October 1.

Acreage and Production. The 1953 tobacco planted area of over 240,000 acres, is about 15 percent higher than in 1952 and 3 percent below the 1936-40 average. The increase in acreage over 1952 is attributed to the prospects for better prices than one year earlier. The drachma devaluation on April 10 brightened export prospects. The largest increase in acreage was in the islands, where it was over twice as great as one year earlier. The increase in Thessaly was 22 percent and in Western Macedonia about 46 percent of last year. In the Peloponnesus (irrigated tobacco) and Fokia competition with tomatoes and cotton reduced the acreage.

It is expected that the 1953 production of tobacco will be about 138,000,000 pounds. This is about 59 percent above last year's unusual production of 87,000,000 pounds but about equal to the prewar average production. This sharp increase is attributed to the rains of last spring and early summer which favored the development of larger plants and leaves.



GREECE: - Planted area, yield and production, 1953

Area	Acreage	Yield Per Acre	Production
		<u>Pounds</u>	<u>1,000 pounds</u>
East Macedonia and Thrace	104,570	545	57,002
Central and West Macedonia	43,341	814	35,274
Thessaly	12,733	964	12,275
Phthiotis and Fokis	6,192	629	3,893
Aetolia-Acarnania	33,121	547	18,131
Epirus	2,215	678	1,440
Peloponnesus	9,830	718	7,055
Thebes	1,080	653	705
Islands	3,450	613	2,116
Total	216,442	637	137,891
1952	188,742	460	86,954

Quality of 1953 Crop. According to early indications, the quality of the 1953 tobacco crop is below that of last year. The first three pickings were thick and heavy and of a poor color. The reason for the poor quality is given earlier in the report.

Home Manipulations. Home manipulation started about the middle of October. This is about 15 days earlier than last year. Rains which fell in early October provided the needed humidity necessary for the handling of the dry tobacco leaves. It will be supervised as last year, by 170 extension specialists of the Hellenic Tobacco Board in order to help the farmers produce a better grade of tobacco.

In order to reduce the high production costs of tobacco the home manipulation process has been under study for several years. In 1952, the Government for the first time authorized the sale without home manipulation of about 1,985,000 pounds of tobacco from Thrace and Macedonia. This was done in order to study its effects on production costs and quality, as well as to get the reaction of the buyers. For the 1953 crop, authorization was granted for the sale of unmanipulated tobacco amounting to 4,850,000 pounds. This year a close study of the new system will be made by Government experts. Considerable interest is being manifest in the possibility of eliminating this expensive process in the preparation of tobacco for market.

FOREIGN TRADE

From the beginning of 1953 the pressure of the indigenous exportable stocks of tobacco began to decrease. This was brought about by: (1) the small amount of exportable tobacco available from the 1952 crop (66,000,000 pounds); (2) the appearance in the Greek tobacco market of new buyers including Eastern Germany, Russia, Hungary, and Yugoslavia; and (3) the drachma devaluation designed to encourage foreign sales. The stocks of exportable tobacco in Greece on September 1, 1953, (about 104,000,000 pounds) were approximately 25 percent less than those of one year earlier.

The total exports during the tobacco year September 1, 1952, through August 31, 1953, were 96,764,000 pounds in comparison with 82,000,000 pounds for the same period one year earlier. West Germany took over 1/3 of the total exports, followed by France and the United States with 19 percent and 15 percent, respectively.

Tobacco experts in Greece forecast tobacco exports for the period September 1, 1953, to August 31, 1954, at about 96,800,000 pounds. To October 10, 1953, about 35,265,000 pounds were contracted for shipment during October, November, and December at prices between 77¢ and 78¢ per pound for American grades and 38¢ and 43¢ per pound for European grades.

During June, July, and August of this year about 8,832,000 pounds of leaf were exported. This is about 2.6 times as much as the 3,375,000 pounds shipped in the similar three months of 1952. Western Germany, Eastern Germany, Bulgaria, Egypt, Russia, Italy, Poland, and Yugoslavia were the largest importers during the period June 1 to August 31, 1953.

1. The first part of the paper is devoted to a general discussion of the problem of the origin of life. It is shown that the problem is one of the most important and most difficult in the history of science. The author discusses the various theories of the origin of life, from the spontaneous generation of life from non-living matter to the theory of the origin of life from pre-existing life. The author concludes that the most probable theory is the theory of the origin of life from pre-existing life.

2. The second part of the paper is devoted to a detailed discussion of the theory of the origin of life from pre-existing life. The author discusses the various stages of the evolution of life, from the first appearance of life to the present day. The author concludes that the theory of the origin of life from pre-existing life is the most probable theory.

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FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT-28-53

November 17, 1953

CANADIAN FLUE CURED TOBACCO SITUATION 1/

The 1953 crop of flue cured tobacco in Canada is now estimated at about 128 million pounds. This compares with 132 million pounds, green weight, produced in 1952. In the main Ontario growing district the crop appears to be very similar in size to that of last year, but production probably will not be as large as last year's crop. Yields were somewhat better than expected. The 1953 acreage allotments were made with a target in mind of 120 million pounds.

Marketing of the new crop opened on November 3rd and a price committee of the Marketing Board consisting of three buyers, three growers and the chairman, have agreed on a minimum average price of 43¢ per pound. This compares with 42 1/4¢ for the 1952 crop. Tobacco is not marketed on auction floors in Canada but buyers examine, bid on and buy the entire crop of each individual grower. The buyers are committed to a range of prices for some 18 grades varying from 24.98¢ a pound to 83.25¢ a pound. These prices weighted by estimated quantities of each grade bring about the average price of 43¢. The Marketing Board grades about one-third of each growers' crop so that if a grower is under paid the amount can be ascertained and recovered from the buyer. Prices for various grades of the 1953 crop are stated below.

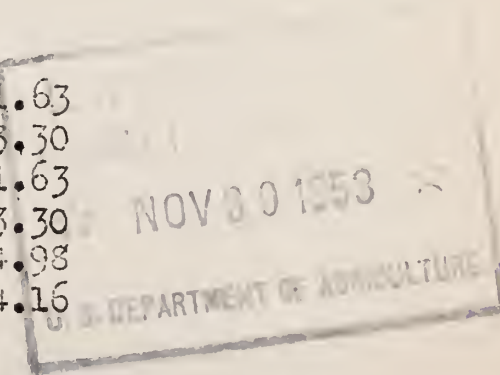
Cents per Pound

B 1	83.25	B 5	28.31	M 1	41.63
B 2	66.60	B 6	20.81	M 2	33.30
B 2 L	58.28	C 2	83.25	X 2	41.63
B 3	49.95	C 3	66.60	X 3	33.30
B 3 L	42.46	C 4	58.28	X 4	24.98
B 4	34.97	C 5	49.95	ND	04.16

Disposal of 1952 Crop

Marketing and disposal of the large 1952 crop was less of a problem than was expected a year ago. Domestic consumption improved substantially.

1/ Based on a November 3rd report from Mr. Paul O. Nyhus, U. S. Agricultural Attache to Canada.



Excise taxes collected from cigarettes for the year October 1, 1952 to September 30, 1953 represent 20,010 million cigarettes. This is 14 per cent larger than the 17,535 million cigarettes on which taxes were paid in 1951-52.

Withdrawals of flue cured leaf from bond for manufacturing purposes were 78 million pounds for the year October 1, 1952 to September 30, 1953 compared with withdrawals of 73 million pounds for the previous year. It is believed that the reduction in cigarette taxes of 4¢ a package made on February 19, 1953 is the main explanation for the greater consumption. With a package of 20 cigarettes retailing at approximately 33¢ in Ontario, and 37¢ in Quebec, prices continue comparatively high, particularly as wage and salary levels are lower than in the U. S.

In 1952 the United Kingdom made Canadian dollar allocations for the purchase of only 8 1/2 million pounds of Canadian flue cured leaf. Consumption in England for that year was partly at the expense of accumulated stocks. In May, 1953 an allocation of Canadian dollars for purchases from the 1953 crop was made which will permit the purchase of 25 million pounds of Canadian re-dried leaf. The English tobacco companies, in view of insufficiently aged leaf in their own stocks, were especially interested in old crop leaf and it is estimated that purchases and shipments of about 14 million pounds from old stocks have been made. On the programmed basis only 11 million pounds could be bought from the 1953 crop. Utilization of the 1952 crop of 132 million pounds green weight (119 million pounds re-dried wt.) was as follows:

Domestic manufacture	78	million	pounds
Exports to United Kingdom	23	"	"
Other exports	6	"	"
Increase in stocks	11	"	"
Total	118	"	"

1953 Crop

Prospective utilization of the 1953 crop (about 115 million pounds dried wt.) probably will be about as follows:

Domestic manufacture	86	million	pounds
Exports to United Kingdom	11	"	"
Other exports	7	"	"
Increase in stocks	11	"	"
Total	115	"	"

About 11 million pounds of leaf are added to September 30 stocks in each of the two crop years. Stocks of 137 million pounds on September 30, 1953 are large but not of sufficient magnitude to be disturbing.



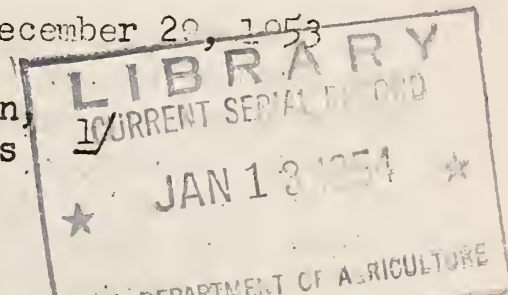
FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT 29-53

December 29, 1953

Philippine Islands, Tobacco Production,
Foreign Trade and Current Developments



SUMMARY

The 1952-53 tobacco crop, according to a preliminary estimate, is 46,892,000 pounds of Native types and 2,205,000 pounds of Virginia leaf. This compares with 1951-52 at 55,688,000 pounds of Native types and 3,102,000 pounds of Virginia leaf.

The reduction in the 1952-53 crop is due to unfavorable weather conditions and low prices. The doubling in price of Native tobacco since January, 1953 due to the short supply and active demand, will undoubtedly influence producers to increase planted acreage in Native types in 1953-54. There may be a slight increase in planted area of Virginia types.

Imports of unmanufactured Virginia flue-cured leaf from the United States during the first half 1953 totalled 11,993,000 pounds. Part of this was shipped against licenses approved in 1952. Under Republic of the Philippines Act No. 698 license for 1953 have been approved for importing a total of approximately 14 million pounds of unmanufactured foreign leaf.

PRODUCTION

The Bureau of Census and Statistics estimated the 1952-53 tobacco crop on a preliminary basis at 46,892,000 pounds of Native types and 2,205,000 pounds of Virginia types from 84,000 acres and 4,400 acres, respectively.

The 1951-52 crop consisted of 55,688,200 pounds of Native types and 3,102,000 pounds of Virginia types on 108,700 acres and 5,880 acres, respectively.

Weather conditions, particularly untimely heavy rains and typhoons caused damage to the 1952-53 crop. Another cause of lower production is the fact that prices for Native types have not been sufficiently remunerative to producers during past years to prevent them from shifting to better paying crops.

1/ Based largely on a report from Mr. J. L. Dougherty, Agricultural Attache in Manila

FOREIGN TRADE

Imports of unmanufactured leaf tobacco from the United States for the first semester of 1953 amounted to 11,993,000 pounds. (See Table IV). Manufactured cigarette imports totalled 169,793,000 pieces; chewing tobacco 330, pounds and smoking tobacco 55,115 pounds. Most of the manufactured tobacco also came from the United States. Comparative imports for 1952 are shown in Table IV.

Exports of unmanufactured tobacco during the first half of year was in the form of native cigar type leaf. Spain was the principal market for this tobacco and was the destination for 15,352,800 pounds out of a total 18,240,000 pounds. Cigar exports to the United States were 1,907,000 pieces out of a total of 2,729,000 pieces. Cigarette exports amounting to 100,000 pieces were shipped to Hong Kong. The United States received 593,000 pounds of tobacco scraps out of the total of 674,000 pounds exported. Comparative exports for 1952 are shown in Table V.

CURRENT DEVELOPMENTS

The Deputy Governor of the Central Bank issued instructions on October 28 to all tobacco manufacturers to supply the Central Bank with information by November 2 regarding total imports of tobacco leaf since 1950 and up to September 30, 1953, including quantity and dollar value. There was a place on the form issued for this information so that each license could be listed showing date of issuance, quantity and value. The date of arrival of shipments was also requested and other detailed information such as special taxes paid. Failure to provide this information for the Central Bank is considered a waiver of all privileges for an adjustment of quota allocations for Virginia leaf for the last half of 1953.

This information was for the purpose of enabling the Central Bank to determine how to allocate approximately 4,000,000 pounds of Virginia leaf tobacco among cigarette manufacturers. Manufacturers have claimed that this amount was still due them according to law for calendar year 1953.

Apparently, the Central Bank had considered previous information recently presented to them by the cigarette manufacturers as sufficient for the purpose of making allocations for the second semester, and was considering issuing licenses in early November. (All 1953 import licenses have been issued)

FILLER TOBACCO QUOTAS APPROVED

The Secretary of Commerce, approved two quota orders which permitted temporary allocations for the unfilled quota of scrap and filler tobacco to the United States.

SHIPPING COMPANIES REQUESTED CURB SALE OF CIGARETTES

In several cases in which companies failed to ship the full amount of scrap and filler tobacco allocated to them, authorities reallocated the amounts to other companies.

FORECAST

Trade sources state that 1953-54 production will be larger than 1952-53 due to increased prices for Native and Virginia leaf. Native leaf tobacco has shown a sharp increase in price from January to October. Virginia leaf prices have advanced only slightly during this period. The 1953-54 crop has not yet been planted but the improvement in prices is expected to cause an increase in area planted.

TABLE I - Philippines: Tobacco production and acreage, prewar 1937-41 average, and annual 1945-46 to 1952-53

Year	Area			Yield per acre		Production ^{1/}		
	Native acres	Virginia acres	Total acres	Native pounds	Virginia pounds	Native 1,000 pounds	Virginia 1,000 pounds	Total 1,000 pounds
1937-41 av.	177,912	-	177,912	430	-	77,161	-	77,161
1945-46	66,717	-	66,717	474	-	31,596	-	31,596
1946-47	81,543	-	81,543	477	-	38,920	-	38,920
1947-48	83,223	-	83,223	458	-	38,098	-	38,098
1948-49	95,378	348	95,726	505	582	48,122	203	48,325
1949-50	113,468	371	113,839	511	591	57,976	220	58,197
1950-51	124,061	1,762	125,823	524	583	64,967	882	65,840
1951-52	108,724	5,881	114,605	512	527	55,688	3,102	58,790
1952-53 ^{2/}	84,014	4,942	88,956	558	445	46,892	2,204	49,096

^{1/} Dry weight, sun, air or flue-cured.

^{2/} Preliminary.

Source: Bureau of Census and Statistics.

TABLE II - Philippines: Output of manufactured tobacco products
by specified years & January-June 1953.

	CIGARS (1,000 pieces)	CIGARETTES (1,000 pieces)	SMOKING TOBACCO (1,000 pounds)	CHEWING: TOBACCO (1,000 pounds)
1937-41	312,887	3,136,761	425	362
1945	11,669	251,555	65	87
1946	48,738	1,136,396	235	212
1947	58,034	1,867,711	222	230
1948	87,146	1,861,753	437	321
1949	91,764	1,850,348	435	504
1950	93,434	7,495,309	577	458
1951	91,020	9,013,753	352	696
1952	86,107	11,538,251	355	509
1953				
January	7,328	1,274,998	58	54
February	9,731	1,096,431	39	28
March	9,068	1,102,374	48	33
April	8,142	1,071,988	49	35
May	8,192	1,068,302	43	26
June	7,477	1,141,917	43	24
Jan-June	49,938	6,756,010	285	200
Total				

Source: Bureau of Census & Statistics

- 1/ 9,162,193 were Virginia type cigarettes.
2/ 5,320,384 were Virginia type cigarettes.

TABLE III - Philippines: Cigarettes manufactured during
January-September 1955 ^{1/}

MONTH	NATIVE (million pieces)	VIRGINIA LEAF BLENDED (million pieces)	TOTAL (million pieces)
January	275	968	1,242
February	233	831	1,064
March	216	869	1,085
April	213	876	1,089
May	212	869	1,081
June	215	907	1,122
July	213	813	1,026
August	238	805	1,044
September	250	889	1,139

Source: Bureau of Internal Revenue.

^{1/} Number on which taxes were paid.

TABLE IV - Philippines: Imports of Tobacco products by countries of origin and specified years

	Average 1935-39 pounds	Average 1948-51 pounds	1952 pounds	1953 Jan. June pounds
UNMANUFACTURED				
Leaf Tobacco ^{1/}				
U.S. and Territories	1,058,417	9,883,943	32,542,383	11,994,261
Other	16,402	^{2/} 16,896	^{3/} 2	0
Total	1,074,819	9,900,839	32,542,385	11,994,261
Stems and Scraps				
U.S. and Territories				20,426
	1,000 pcs.	1,000 pcs.	1,000 pcs.	1,000 pcs.
MANUFACTURED				
Cigars				
U.S. and Territories	21	21	1	-
Cuba	0	0	0	0
Total	21	21	1	0
	1,000 pcs.	1,000 pcs.	1,000 pcs.	1,000 pcs.
Cigarettes				
U.S. and Territories	2,711,758	5,688,139	876,975	169,682
Great Britain	10	2	93	3
Hong Kong	24	3,863	5,006	68
Others	16	3,130	9	40
Total	2,711,808	5,695,134	882,083	169,793
	pounds	pounds	pounds	pounds
Chewing Tobacco				
U.S. and Territories	639,192	634,102	683,781	331,541
Others	-	^{4/} 4	8,003	0
Total	639,192	634,106	691,784	331,541
	pounds	pounds	pounds	pounds
Smoking Tobacco				
U.S. and Territories	83,433	280,698	147,175	55,653
China	14,372	7	22	99
Hong Kong	146	117	67,498	115
Others	743	79	75	15
Total	98,694	280,901	214,770	55,882
	pounds	pounds	pounds	pounds
Other Tobacco				
U.S. and Territories	9,184	176,996	8,730	0
Hong Kong	-	-	17,311	0
Total	9,184	176,996	26,041	0

^{1/} Mostly Virginia flue-cured tobacco.

^{2/} 1951 only; 5,900 from Turkey.

^{3/} From Great Britain.

^{4/} From Hong Kong.

- Insignificant. Less than 1,000.

Source: Bureau of Census and Statistics.

TABLE V - Philippines: Exports of tobacco products by countries of destination and specified years.

	Average 1935-39 pounds	Average 1948-51 pounds	1952 pounds	1953 Jan-June pounds
UNMANUFACTURED TOBACCO				
U.S. and Territories	615,410	444,950	1,958,661	137,888
China	461,207	96,334	0	0
Belgium	264,616	481,833	745,563	1,062,807
Fr. East Indies	115,764	609,442	1,469,245	685,697
French Africa	894,977	192,208	132,596	198,414
Netherlands	4,359,528	5,185	47,591	510,394
Spain	14,450,143	7,917,841	19,971,493	15,353,463
Other	10,128,058	100,340	503,614	292,852
Total	31,289,703	9,848,133	24,828,763	18,241,515
	1,000 pcs.	1,000 pcs.	1,000 pcs.	1,000 pcs.
Cigars				
U.S. and Territories	187,596	1,032	1,984	1,907
Hong Kong	727	824	1,182	484
Spain	1,661	6	6	5
Switzerland	129	34	25	19
Other	11,872	197	222	314
Total	201,985	2,093	3,419	2,729
	1,000 pcs.	1,000 pcs.	1,000 pcs.	1,000 pcs.
Cigarettes				
Hong Kong	2,068	106	3	100
Italy	1,925	0	0	0
Other	33,358	50	0	0
Total	37,351	156	3	100
	pounds	pounds	pounds	pounds
Smoking Tobacco				
U.S. and Territories	93	0	0	0
Other	6,102	4	0	0
Total	6,195	4	0	0
	pounds	pounds	pounds	pounds
Tobacco Scrap				
U.S. and Territories	5,755,016	12,033	1,255,246	593,966
Belgium	58,936	0	26,576	0
Other	120,726	0	2/ 21,515	2/ 82,486
Total	5,934,678	12,033	1,303,337	676,452
	pounds	pounds	pounds	pounds
Other Tobacco				
U.S. and Territories	118,303	0	0	0
Other	2	3/ 503,899	0	0
Total	118,305	3/ 503,899	0	0

1/ 1951 only.

2/ All to Netherlands.

3/ 1951 only - all to Hong Kong.

Source: Bureau of Census and Statistics.

Statement of Expenses for the Year 1961

Line Item	1961	1960	1959	1958	Description
100,000.00	100,000.00	100,000.00	100,000.00	100,000.00	Operating Expenses
101,000.00	101,000.00	101,000.00	101,000.00	101,000.00	Salaries and Wages
102,000.00	102,000.00	102,000.00	102,000.00	102,000.00	Travel Expenses
103,000.00	103,000.00	103,000.00	103,000.00	103,000.00	Telephone Expenses
104,000.00	104,000.00	104,000.00	104,000.00	104,000.00	Postage and Freight
105,000.00	105,000.00	105,000.00	105,000.00	105,000.00	Printing and Stationery
106,000.00	106,000.00	106,000.00	106,000.00	106,000.00	Repairs and Maintenance
107,000.00	107,000.00	107,000.00	107,000.00	107,000.00	Utilities
108,000.00	108,000.00	108,000.00	108,000.00	108,000.00	Insurance
109,000.00	109,000.00	109,000.00	109,000.00	109,000.00	Depreciation
110,000.00	110,000.00	110,000.00	110,000.00	110,000.00	Interest
111,000.00	111,000.00	111,000.00	111,000.00	111,000.00	Income Tax
112,000.00	112,000.00	112,000.00	112,000.00	112,000.00	Other Expenses
113,000.00	113,000.00	113,000.00	113,000.00	113,000.00	Net Income
114,000.00	114,000.00	114,000.00	114,000.00	114,000.00	Total



FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
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WASHINGTON, D. C.

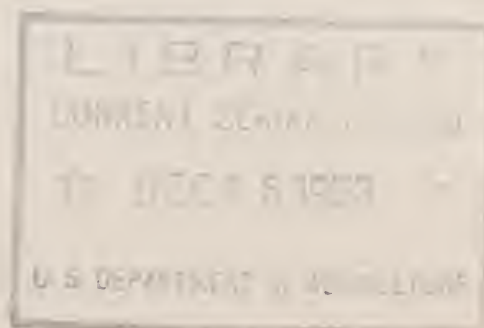
FT 30-53

December 3, 1953

THE REPUBLIC OF THE PHILIPPINES APPROVES THE REMAINDER
OF TOBACCO LEAF IMPORT LICENSES FOR 1953

Mr. Joseph Dougherty, Agricultural Attache, reports that the Central Bank has issued import licenses for the second half of 1953, totaling 3,864,500 pounds of leaf tobacco valued at \$2,506,686.

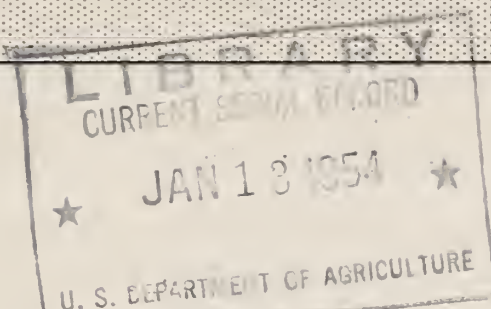
According to data in the Foreign Agricultural Service, this accounts for the remainder of the licenses for approximately 14 million pounds of foreign tobacco leaf imports permissible for 1953 under the Republic Act #698.





FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.



FT 31-53

December 21, 1953

TOBACCO PRODUCTION AND TRADE OF CUBA, DOMINICAN REPUBLIC AND PUERTO RICO ^{1/}

The principal tobacco-producing islands of the West Indies--Cuba, Puerto Rico and Dominican Republic--are known for their fine quality cigar tobacco. Their climate, soils and rainfall are ideal for the production of cigar tobacco. The better tobacco soils are on the mountain sides and in small valleys throughout the islands, although these vary because of the prevailing mountainous terrain.

Wide variations in the quality and characteristics of West Indian tobacco are accounted for to a great extent by the choice of soil, methods of production and the differences in the handling and processing. Perhaps the generally outstanding characteristics of tobacco produced in the West Indies are fine aroma, good burning qualities and the fact that it is an excellent tobacco for blending with other tobaccos.

Cuban tobacco is outstanding in its aromatic qualities which are due largely to the way in which it is processed and aged. It is fermented lightly and aged longer than other tobaccos. No fertilizer is added to the soil except in fields which are irrigated. Leaves are small and gummy and the old indigenous variety is used in the production of practically all tobacco for export.

Puerto Rican tobacco, compared to that from Cuba, is a larger variety and is produced with commercial fertilizer. It is fermented much more than Cuban tobacco and needs very little aging which accounts for its mildness.

Tobacco from the Dominican Republic varies from the mildness of Puerto Rican tobacco to the strong aromatic qualities of the Cuban tobacco. The Dominican Republic has more new desirable land available for producing tobacco than either Cuba or Puerto Rico.

Producers in Puerto Rico realize a greater cash return from tobacco than do those of either Cuba or the Dominican Republic. This is due largely to a higher yield per acre, better marketing methods, and a market Support Program.

^{1/} Based on a report by S. J. Adams, Tobacco Specialist, Production and Marketing Administration, Caribbean Area Office.

The qualities of Cuban tobacco are known throughout the world because the Cuban Government, trade organizations, dealers and manufacturers who use Cuban tobacco effectively promote the sale of Cuban tobacco. The desirable qualities of tobacco from Puerto Rico and the Dominican Republic are not widely advertised by the manufacturers who use it extensively.

In general, large farms on each of the three islands are well managed, have good equipment and sufficient credit for operating expenses. However, the average producer is a comparatively small operator.

Because of the favorable natural elements such as temperature, rainfall and soil production could be expanded if incentives were sufficient.

The 1952-53 tobacco crops in Cuba, Dominican Republic and Puerto Rico are good and are approximately 3 to 5 percent above normal in yield per acre, due primarily to the good growing and harvesting seasons.

Cuban wrappers and binder leaf from the current crop have more than the usual number of greenish blotches but this cannot be determined as lasting inferior quality until aging is completed. Filler tobacco is on the thin side and will not require as much aging before using. Thinness of current filler leaf will probably lessen its aromatic qualities, but it will be milder and smoother in taste.

The 1952-53 crop in the Dominican Republic is above average in all respects. Aside from the fact that the growing season was good, the harvesting and curing seasons were excellent. Because of the comparatively high number of inadequate curing barns, the harvesting and curing seasons are important factors in determining quality.

The Puerto Rican crop is excellent in quality and yield per acre. There are a few districts in which heavier tobaccos have a tendency to bruise during fermentation; however, the damage suffered in this respect is reported to be small. The crop as a whole is 5 to 8 percent above normal in quality and yield per acre.

CUBA

Cuban cigar tobacco is known throughout the world for its outstanding aroma, a fact which makes it most desirable for blending with other tobaccos. Contrary to general opinion, however, not all of the tobacco produced in Cuba is of this fine quality.

Production, Quotas and Prices

Approximately forty percent or 39.4 million pounds of an estimated 80.5 million pounds of Cuban tobacco produced in 1952-53 comes from the Vuelta Abajo district and is recognized as the best cigar tobacco grown. Ninety-six percent of Vuelta Abajo tobacco is used by domestic manufacturers.



Tobacco bulked in barrels is stored in a Cuban warehouse.



Cuban dealers grade baled hands of tobacco.



Shade-grown wrapper tobacco such as that found in the Vuelta Abajo and Partido Districts, Cuba. Note irrigation pipes.

Thirty percent of the island's total crop is produced in the Remedios district and practically all of it is exported to the United States for blending with other tobaccos. The three percent of the total crop which is produced in the Partido district is fire-cured wrapper. The balance or 27 percent of the total crop, which is relatively lower in quality, is used locally for cigarettes and other products, or is disposed of in foreign markets. Under normal conditions approximately one-third of the tobacco produced in Cuba is adaptable in the United States to blending with other tobaccos.

Five separate types of tobacco from five different districts are recognized by the trade. From the Western to the Eastern part of the Island these districts are: Vuelta Abajo, Semi-Vuelta, Partido, Remedios, and Oriente.

Vuelta Abajo - The tobacco produced in this district is the finest grown in Cuba. The leaf is light brown in color, is fine in quality and texture, and normal in size. The leaf is aromatic yet mild. Tobacco from this district is for all practical purposes the only tobacco produced in Cuba which can be made into a desirable cigar without blending it with other tobaccos. It is known throughout the world as one of the finest cigar tobaccos. Wrapper, binder and filler tobaccos are produced in this district. Both sun-cured and shade-grown wrapper are produced by the most modern methods which include irrigation, fire-curing and fertilizing. The finest tobacco produced in this area is around San Juan and San Luis in the lowlands. This section is noted for its shade-grown wrappers. The soil is generally sandy with a reddish clay sub-soil.

Some commercial fertilizer is used in the Vuelta Abajo (and Partido) district by producers of wrapper and binder tobacco. There is practically no commercial fertilizer used in the production of tobacco in all of the other tobacco districts of Cuba due to the added expense.

Semi-Vuelta - This district is also a part of the province of Pinar del Rio; however, the soils are heavier and become cloddy after rains. Tobacco produced in this district is low quality, heavy bodied, coarse in texture, and has a stronger aroma. It is used primarily as a filler tobacco for blending with other tobaccos in the manufacture of cheap cigars and cigarettes.

Partido - This district is south-west of Havana. The rich red soil of this region produces a large, light, slate or sand-colored leaf with a very mild aroma, and fine texture. Practically all tobacco in this district is shade-grown and fire-cured for wrappers. Since there has been a growing demand for wrappers with a light greenish color, these wrappers have become very popular for export to the United States and for use in making cigars for export. The chief characteristics of these wrappers are their light greenish color, neutral taste and texture.

Remedios - the tobacco produced in this district is very important because ninety percent of the Cuban tobacco exported to the United States

is produced in this district. The Remedios district is in the center of the Island, mostly in Las Villas province. The soil in this district is a reddish brown clay mixed with gravel, and has a tendency to clod and crack when wet. When compared with the soils of other tobacco growing areas, this and some other soils used in Cuba do not appear very adaptable to the production of tobacco. The Remedios leaf is gummy, fine in texture and aromatic. It is suitable only for blending with other cigar leaf. When smoked without blending it is strong and peppery in taste. This tobacco is produced without the use of fertilizer, and two to three cuttings are harvested from each plant. Forty to sixty percent of the total average yield of 480 per acre, depending on the rainfall, is second and third cuttings (suckers). With such a relatively low yield per acre and high handling cost due to the size of the leaf, returns to producers, based on an average price received of from twenty two to twenty-seven cents per pound, are comparatively low.

Oriente - This district consists of two widely separated areas in the eastern end of the Island. The tobacco produced in Oriente is coarse in texture, inferior in quality and has a strong aroma and taste. Practically all of this tobacco is used in domestic cigarettes and chewing tobacco, and other products.

Cuba has a quota system under which there is a declared minimum price each year. The minimum price for the 1952-53 crop is twenty-five cents per pound, crop average. A Government Stabilization Fund was set up to support tobacco prices by purchasing all within-quota tobacco not sold at or above the minimum price. In 1952 the Stabilization Fund destroyed by burning 29.2 million pounds of tobacco, but currently has on hand stocks amounting to 1,200,000 pounds.

The following table shows Cuban tobacco production by districts for 1950-51, 1951-52 and estimated 1952-53, with Government assigned quotas for the last three years:

Table I

Cuba, Tobacco Leaf Production, by
1950-51, 1951-52, and 1952-53

District	1950-51	1951-52	1952-53*
	Million Pounds		
Vuelta Abajo	42.0	35.3	39.4
Remedios	24.3	29.6	31.0
Semi-Vuelta	6.2	4.2	4.4
Partido	2.5	2.6	2.8
Oriente	3.2	3.0	2.9
Total	78.2	74.7	80.5
Government Quota	-	65.9	78.6

*Estimated.

The 1953-54 quota for Cuba is 81 million pounds.

The lack of more modern methods of cultivation and greater applications of commercial fertilizers are two important reasons for Cuba's low-yield per acre. These facts coupled with the need for improved marketing methods and relatively low returns to producers account for the subsistence level of tobacco producers.

Table II

Cuba, Tobacco Leaf, Average Yield per acre, by Regions,
Averages 1939-41, 1942-46, and Annual 1947-1952

Crop Year Ending Sept. 30	Vuelta Abajo	Semi- Vuelta	Partido	Remedios	Oriente	Total Cuba
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds
1937-41	502	395	673	475	897	492
1942-46	554	401	669	471	790	505
1947	573	386	727	554	850	559
1948	579	382	757	496	983	531
1949	597	357	685	379	936	476
1950	591	448	724	694	791	642
1951	674	519	658	385	1,203	544
1952	649	510	708	447	904	549

In 1952 there were 6,353 farms producing tobacco. Average acreage per farm was 21 acres.

Table III

Cuba, Average Price Per Pound Paid by Dealers
and Stabilization Fund, 1949 to 1952

	1949	1950	1951	1952
		<u>Cents per pound</u>		
<u>Vuelta Abajo</u>				
Buyers Declaration		38.28	41.80	44.98
Fund		25.91	27.80	32.96
Average	40.90	34.77	35.13	44.88
<u>Semi-Vuelta</u>				
Buyers Declaration		20.69	24.10	25.26
Fund		19.16	25.04	21.52
Average	22.25	20.39	24.64	25.04
<u>Partido</u>				
Buyers Declaration		137.90	173.71	108.57
Fund		64.35	76.77	91.72
Average	113.54	119.03	144.10	106.99
<u>Remedios</u>				
Buyers Declaration		25.83	26.95	27.48
Fund		19.18	25.03	25.73
Average	21.63	24.09	26.76	27.48
<u>Oriente</u>				
Buyers Declaration		31.55	31.37	23.27
Fund		24.48	35.85	29.20
Average	34.56	26.83	34.19	24.14

Harvesting Methods and Handling

The handling of Cuban tobacco in the various districts, on farms, and through the packing warehouses consists of many complicated operations performed with great care and precision. This is especially true with respect to wrappers, binders and fillers for export.

There are several methods for harvesting tobacco in Cuba. Filler tobacco is harvested by cutting off portions of the stalk, as they mature, containing two or three leaves. These are placed astride sticks which are then put on racks in the field and dried from one to eight days depending

upon the weather and condition of the tobacco. The tobacco is then put in the barn to be air-cured for several months. After curing it is packed in bales or boxes with enough moisture to bring about a light fermentation. The farmer loses from six to eight per cent in weight during this fermentation. When fermentation is completed the tobacco is ready for the market.

Wrapper and binder tobacco is harvested by pulling it from the stalk as it ripens and stringing it on sticks for curing. The curing and fermenting processes are similar to those used on filler tobacco; however, much more care and precision is exercised. This tobacco is usually fermented in the most modern warehouses with the best equipment. After it has been lightly fermented, it is graded leaf by leaf, and each leaf is counted and tied into bundles before packing into bales.

Cuban tobacco is usually sold on the farm to a "time" merchant or dealer who finances the producer. The entire crop is sold at an average price. Delivery of the tobacco is made to a purchaser or dealer, and receipts usually cover debts plus an amount above Government minimum price to compensate for above average quality. There are no tobacco farmers' co-operative associations in Cuba.

Grading

Grading is usually done after the tobacco is delivered to the dealer. The grading of Cuban tobacco is very different from most other cigar tobaccos. Although there are name grades which are used in all areas, they are usually based on number of cuttings and vary from farm to farm. The tobacco is delivered to the dealer in farm bales of 200 to 225 pounds. The dealer then grades the tobacco by removing the leaves from the pieces of stalk and classifying them into one to five grades depending on the quality of the tobacco. A farm bale of 200 to 225 pounds yields about 150 pounds of classified tobacco after the stalk is removed.

Exports and Value

All Cuban tobacco for export is extremely well handled and packed. Since Cuban tobacco is fermented very little before final packing in bales, a longer period of time has to be allowed for the fermentation in the bales before using it in the manufacture of cigars. Bale fermentation is known in Cuba as the aging process. Since the cost of labor, storage, etc., is gradually increasing, it may be necessary in the future to change some of the present methods of handling and processing the tobacco.

The following table gives the prices of Cuban leaf tobacco and cigars as indicated by average value of export to the United States from 1939 to 1952. The wide margin between the prices received by the farmers and the prices received by dealers represents a loss in fermentation, storage, taxes, high cost of labor, profit, etc.

Cuba, Average Price per Pound of Tobacco
Exported to the United States, Average 1939-41 and Annual 1947-52

Year	Wrapper	Unstemmed Filler	Stemmed Filler	Scrap	Cigars
	\$ per lb.	\$ per lb.	\$ per lb.	\$ per lb.	\$ per 1,000 pieces
1939-41	1.69	0.47	0.62	0.26	107.94
1947	3.39	0.76	1.47	0.63	189.58
1948	3.40	0.83	1.23	0.56	190.02
1949	3.09	0.60	1.31	0.55	188.41
1950	3.12	0.63	1.37	0.59	190.61
1951	3.55	0.59	1.40	0.65	180.10
1952	3.43	0.58	1.47	0.68	185.00

The quality of Cuban tobacco is known throughout the cigar smoking world. The Cuban Government, dealers and manufacturers have for many years used every means possible to make known the qualities of Cuban tobacco. Cigar manufacturers in all countries where Cuban tobacco is used have supported these claims through the advertisement of their own products as containing Cuban tobacco. Extreme care and precision are exercised by the leaf dealers in grading, packing and presenting the tobacco for sale.

Through well-managed marketing and advertising practices, Cuban tobacco and cigars are sold in twenty-two foreign countries. Approximately two-thirds of the crop is normally exported. The United States, Spain, and Germany are usually the largest buyers. The United States continues to be the dominant export market taking 72 percent of the total exports.

The following tables show exports in 1951 and 1952 to the United States and to all other countries:

Cuba, Tobacco, Leaf and Manufactured Exports to the
United States, 1951, 1952 and Estimated Jan.-June 1953

Product	Quantity		Value		Est. Jan.-June 1953	
	1951	1952	1951	1952	Quantity	Value
	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	dollars	dollars	pounds	dollars
Leaf:						
Wrapper	1,246	1,303	4,359	4,390	243.8	925.8
Unstemmed filler	6,549	6,307	3,780	3,584	3,459.4	1,835.8
Stemmed filler	15,066	14,684	15,613	15,973	5,555.5	7,958.7
Scrap	5,684	6,507	2,719	3,272	2,489.2	1,655.3
Total	28,545	28,801	26,472	27,218	11,747.9	12,375.6
	1,000	1,000	1,000	1,000	1,000	1,000
	cigars	cigars	dollars	dollars	cigars	dollars
Manufactured:						
Cigars	13,550	15,041	2,440	2,876	5,164.6	1,039.1
TOTAL VALUE	-	-	28,912	30,094	-	13,414.7

Cuba, Tobacco, Leaf and Manufactured, Quantity and
Value of Exports to all Countries,
1951, 1952 and Estimated Jan.-June 1953

Product	Quantity		Value		Est. Jan.-June 1953	
	1951	1952	1951	1952	Quantity	Value
	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	dollars	dollars	pounds	dollars
Leaf:						
Wrapper	1,392	1,407	4,768	4,848	280.9	1,040.4
Unstemmed Filler	20,818	22,630	9,672	10,577	9,037.8	4,487.9
Stemmed Filler	15,492	15,136	16,067	16,357	5,820.3	8,273.7
Scrap	5,695	6,560	2,722	3,291	2,497.6	1,659.5
Total	43,397	45,733	33,229	35,073	17,636.6	15,461.5
	1,000	1,000	1,000	1,000	1,000	1,000
	cigars	cigars	dollars	dollars	cigars	dollars
Manufactured:						
Cigars	36,956	37,635	6,186	6,551	18,313.8	3,029.6
TOTAL VALUE	-	-	39,520	41,624	-	18,491.1

Stocks

The following stocks data for 1952 show with respect to disappearance that 29.2 million pounds were burned by the Tobacco Stabilization Fund. The actual disappearance of 85.4 million pounds is above the average "normal" disappearance during 1941-52 of 78.2 million pounds. Most of the difference is accounted for by special sale agreements with other countries and by some increased use of tobacco for domestic consumption.

STOCKS

	<u>Million Pounds</u>
Stocks, January 1, 1952	115.0
Harvested, 1951-52 Crop	<u>74.7</u>
Supply	189.7
Disappearance, 1952	<u>114.6</u>
Stocks, January 1, 1953	75.1

In 1952, the Cuban Government had to destroy an accumulation of 29.2 million pounds of undesirable tobacco while the Tobacco Stabilization Fund currently has on hand 1,200,000 pounds of undesirable tobacco. Moreover, the Government has in the past three years disposed of a considerable amount of tobacco by special semi-barter agreements at a loss. The production quota however, has been consistently raised in the past three years, for example: 1951-52, 74.7 million pounds; 1952-53, 77.2 million pounds; 1953-54, 81.0 million pounds. Production has been equal to or above the quotas. Under such circumstances it appears that the Cuban Government desires to produce a sufficient amount of good quality exportable tobacco even though this necessitates a sizable loss on lower quality production.

The 1952-53 Crop

The 1952-53 crop is considered good by most of the export buyers. A few of the buyers are dubious about the thinner leaf which has less gum, milder aroma, and possibly poorer aging qualities. They think that tobacco of the 1952-53 crop may "spend" or lose its strength and aroma too quickly in the aging process. While it follows that such tobacco can be manufactured into cigars more quickly and will produce a milder smoke, export buyers claim that 95 percent of the leaf tobacco is exported for blending with other tobaccos and that its strength, aroma, and burning qualities are the outstanding characteristics needed. Probably the answer is either to increase the proportion of Cuban tobacco in the blends or to produce a milder cigar from the usual blends. In all other respects, the 1952-53 crop is above average. The leaf is bright in color, has excellent burning qualities, and taste and aroma are mild. These conditions vary, however, in some sections where the weather was unfavorable.

Wrapper leaf of the 1952-53 crop has a more than usual number of greenish spots or blotches. It is hard to determine at this stage, before fermentation is completed, whether these greenish spots will be an asset or a blemish. Although the wrapper is a small part of a cigar, it is nonetheless an important part because so often the quality of a cigar is based on its appearance. The outstanding characteristics of the wrappers in the Partido district are the greenish slate color which is in demand for expensive cigars (this greenish color is produced by quick fire-curing); and its neutral taste which allows the good qualities of the filler to predominate. While these wrappers have a very slight aroma it is hardly noticeable when mingled with the aroma of the filler.

The 1952-53 crop of filler tobacco from the Remedios district is very good. The texture of the leaf is thinner than normal but finer in grain. Aroma is excellent and slightly milder than usual. The color varies from heavy tan to a mahogany. The thinner leaf with less gum raises a question as to whether this tobacco also will "spend" or lose a part of its aroma in the aging process. Since Cuban tobacco is fermented very lightly it is dependent upon the aging process for setting its color and mellowing its aroma.

There are a few well managed progressive tobacco farmers in Cuba. The average producer, however, is relatively small and under-equipped though apparently aware of modern tobacco technology. Some foreign dealers and cigar manufacturers have bought land and equipment for producing tobacco and are operating their farms according to modern methods.

DOMINICAN REPUBLIC

Some of the world's finest cigar tobacco is produced in the Dominican Republic although a large quantity is inferior in quality. There are tobaccos produced on the Island that yield good wrappers, binders and fillers from which excellent cigars can be made.

Tobacco is the fourth major export crop of the Dominican Republic following sugar, coffee, and cacao. Total tobacco production ranges from 28 to 50 million pounds a year.

Eighty-five percent of the tobacco is grown in five provinces: Santiago, Puerto Plata, La Vega, Espaillat and Benefactor. Seventy-five percent of total output is produced in the Santiago and Puerto Plata districts. The best quality tobacco is grown in the dry region around Santiago and in the Cibao Valley, which extends to La Vega and Bonao. Around Bonao the rainfall is normally heavy and this section produces the best wrappers, possibly due to overcast skies which furnish shade for a great part of the tobacco season. The best growing season is from December to March which is the period of least rainfall.

The most desirable tobacco soils are found in the Cibao Valley where the soil is dark, very fine, light and loamy. No chemical fertilizers are

used in the production of tobacco in the Dominican Republic. Beans and corn are used chiefly as rotating crops, although tobacco is interplanted with other crops.

The production, harvesting, handling and marketing of the Island's tobacco crop as a whole is very primitive. However, there are some producers who market good quality tobacco which has a fine aroma and excellent burning qualities, and is mellow and smooth in taste. This better quality tobacco varies in quantity from 3 to 25 percent of the total crop. The wide variation is due largely to poor equipment, poor curing barns and obsolete methods of producing and handling the crop.

All of the tobacco grown in the Republic is cigar type. The Dominicans use the best grades in the manufacture of their domestic cigars and there is a large and growing use of the poorer grades of tobacco in cigarettes and smoking tobacco for domestic use.

The two major varieties of tobacco are popularly known as "oler" and "criollo," although there are nearly as many varieties as there are plots of tobacco. In most cases all crops will contain one or more varieties.

The "oler" variety produces the better tobacco, principally because it is grown by the best producers, on better soil, with better equipment, under direct or indirect supervision of the local cigar manufacturers. This tobacco is used principally for domestic manufactures. The "criollo" variety is a combination of many varieties grown mostly on small patches of land wherever it is most convenient for the producer and forms the bulk of Dominican tobacco exports. Criollo is exported principally to European countries, particularly Spain, France, Germany.

Under the U. S. Point 4 program a small experiment station has been started for the development of better varieties of tobacco and to give general assistance in the growing, handling and marketing of the Dominican tobacco.

Dominican tobacco is primed from the stalk from bottom to top as it ripens. It is strung in hands of 3 or 4 leaves with palm string which is fastened to a stick at each end. Curing barns are crude, generally made with a few poles covered with thatched palm leaf and usually open on the sides and ends. Consequently, bad weather during the curing season can be very damaging to the crop. It takes from 20 to 40 days to cure tobacco in these barns, after which it is baled using palm leaf covering for the bales. Fermentation takes place in the bales. The length of time required for fermentation depends on the nature of the tobacco and the weather conditions. Some packers are using more each year the bulk method of fermentation.

The Dominican Government is now giving more attention to the production of tobacco by setting up an extension-type program to inform the growers on proper preparation of seed beds, harvesting and marketing of tobacco. The Government is also growing and distributing seedling plants to producers in some districts.

At the present time, approximately fifty percent of the Dominican tobacco growers have not improved the original "Indian" methods of tobacco culture to any great extent. Small tobacco growers appear to barely exist on the cash returns from the sale of their tobacco.

Marketing of Dominican tobacco is by every known method except the auction sale. Tobacco is bought by the field, by the pound in bales, and in baskets. Producers are usually paid an average price for each crop.

Some of the better farmers grade their tobacco according to "pullings," that is the normal position of the leaf on the stalk, and throw out the inferior leaves. Most farmers deliver their tobacco to the dealers with mixed grades and in a comparatively poor condition. The tobacco is classified, fermented and packed by the dealers in their packing or classification warehouses according to their customers' specifications.

There are named grades in general use, such as (1) FF - wrappers, (2) F - binder, (3) A - filler, (4) plug and smoking, and (5) unclassified loose-leaf. However, the quality of grades varies greatly among packers.

The figures in the following table are the best available and are based partially on estimates. Dominican tobacco statistics appear to be incomplete in this respect.

Dominican Republic, Tobacco Stocks-on-hand, and Crop Estimates,
1949-50, 1950-51, 1951-52

	1949-50	1950-51	1951-52
	Pounds	Pounds	Pounds
Stocks, beginning of crop year	1,543,220	7,275,180	14,550,360
Estimated crop	50,500,000	40,000,000	28,400,000
TOTAL SUPPLY	52,043,220	47,275,180	42,950,360
Domestic use:			
Plug and smoking	2,204,600	2,204,600	2,865,980
Cigar and Cigarettes	2,934,323	3,306,900	3,086,440
Exports, crop year	39,669,572	27,226,810	34,832,680
TOTAL Disappearance	46,351,715	40,013,490	55,335,460
Stocks, end of crop year, 2/28/50, 2/28/51, 2/28/52	7,275,180	14,550,360	2,204,600

Information received from dealers and others does not appear to justify the large decline in production in the 3-year period shown in the above table. Estimated 1952-53 production for export is 35,000,000 pounds.

The following are approximate prices received by the growers, and average export value. Export value is f.o.b. dock and includes Dominican tax, warehouse expenses, cartage, profit, etc.

Dominican Republic, Tobacco, Average Price Received by Farmers and
Estimated Average Value of Exports,
1949-50, 1950-51, 1951-52, 1952-53

	1949-50	1950-51	1951-52	1952-53
	Cents per	Cents per	Cents per	Cents per
	Pound	Pound	Pound	Pound
Approximate amount received by farmers after farm fermentation: of 6 to 8%	\$0.0750	\$0.0950	\$0.10	\$0.1250
Estimated Average Export Value	0.17	0.18	0.1850	-

The minimum Government price is 8¢ per pound, crop average.

The grade price of tobacco varies with grading specifications offered by dealers. Lower grades are higher in price, quality considered, than the better grades due to the great demand for cheap tobacco. Most sales of packed tobacco are based on an average price for a percentage of grades in a particular lot. For example, 10% of FF, 10% of F, 55% of A, and 25% of H.S. for an average of \$21.82 per pound. Such a lot would be considered above average. Although the FF and F are called wrappers and binders these grades are actually 80% filler tobacco. The FF and F grades can be bought between 28 and 38 cents per pound leaf form, well sorted, f.o.b. dock. The A grade runs from 22 to 28 cents and the loose-leaf from 18 to 22 cents per pound.

The 1952-53 tobacco crop is above "normal" in quantity (yield per acre) and quality. The tobacco produced for use by the local manufacturers of cigars is of the heavier type recognized as the best quality grown on the island. It burns well, has a nice aroma and a pleasant taste. It is not as smooth a smoke as the best tobacco grown in the Vuelta Abajo district of Cuba; however, it can be classed among the best cigar tobaccos.

The so-called export type of Dominican tobacco contains tobacco varying in quality from very good to very poor due to the methods of culture, seed

variety and the way in which it is handled. The best export tobacco of the 1952-53 crop is light brown in color, fine texture, burns well, has a nice aroma and is mild with a pleasant taste.

The Dominican tobacco plant is average in size, but there is a wide variation in yield per acre, from 550 to 1,250 lbs., due to the different methods of production and the amount of second crop (sucker crop) harvested. Newly cleared land will produce 1,250 lbs. per acre without the use of fertilizer. Approximate average yield per acre is 725 pounds.

The Dominican Republic has plenty of good land, sufficient rainfall and an ideal climate for the production of the best cigar tobaccos. However, there is a great need for better farm equipment, improved varieties of tobacco, adequate curing barns and improved methods of handling and marketing.

PUERTO RICO.

Puerto Rico is a mountainous island, 3,500 square miles in area, and supports about 2 million people. Sugar is the major crop although tobacco (mostly cigar filler type 46) is of great importance especially to those families who live in the mountainous interior where land is not suitable for producing other cash crops. It is estimated that 26,000 families (with 24,000 farm allotments under production quotas) depend upon tobacco for most of their income.

About 1,200,000 pounds of chewing tobacco are produced in the Island each year in the coastal sections of the various tobacco districts, but principally in the section of Guajataca and Quebradillas. Except for experimental purposes and domestic use, there is for all practical purposes no wrapper or binder tobacco produced in Puerto Rico at the present time.

Between 1927 and 1942-43 the production and marketing of Puerto Rico tobacco was under the marketing control of a few large buyers. During this time, the price received by the producers for their tobacco had dropped from the high average of 50 cents per pound to 15 cents per pound in 1942. By April 1942 the production of tobacco in Puerto Rico had reached a deplorable condition. Shipments of tobacco were restricted because of the war. Fertilizer was hard to obtain. Many producers were receiving less than the cost of production. At this point the United States Department of Agriculture was called upon for assistance. These conditions were relieved to a great extent by (1) arranging for the tobacco to be transported to the United States, (2) allocating fertilizer for the production of tobacco, and (3) by extending Commodity Credit Corporation market support at 90 percent of parity. Although no tobacco was acquired under the PMA Marketing Support Program until the 1946 crop, this program exerted a direct influence on the marketing of Puerto Rican tobacco.

10,125,000 pounds of tobacco of the 1946 crop came under Commodity Credit Corporation loans. The PMA Marketing Support Program has continued

in operation and loans have been made each year. The present relatively good degree of stability and progress in production and marketing is due in large part to the support program.

In 1948 the U. S. Tobacco Grading Service was extended to Puerto Rico. Its influence on the grading and handling of Puerto Rican tobacco has definitely been beneficial.

Puerto Rico's temperature and rainfall are ideal for producing cigar tobacco. The soil is of the dark gray loamy type with a reddish clay subsoil, very adaptable to growing tobacco, and there is a large available labor pool that is well acquainted with the production and handling of tobacco. Tobacco grown on the Island for the past hundred years has been recognized as a superior type of cigar tobacco because of its excellent burning qualities and mild pleasant aroma.

There are three tobacco associations in Puerto Rico with a total membership of approximately 10,000 growers, although all of the members do not deliver their tobacco to their association every year. Average participation in the associations amounts to approximately 12,000,000 pounds of tobacco per year. All of the associations depend on the CCC Loan Program Support. The extent of loans to the associations is governed by market conditions or early sale of holdings by associations. The associations have been progressive in the past six years in setting aside working capital, improving their warehouses, etc.

Puerto Rico is currently taking a more active interest in the production of tobacco. The quota system, which is functioning fairly well, will be strengthened by further legislation and possibly by a Production and Marketing Board to act in an advisory status to the Secretary of Agriculture. The Island Government has also set up a tobacco experimental station to develop better varieties of seed adaptable to the various districts of the Island and, as a result, a great many seedling plants are being furnished to the growers at a reasonable price. Through tax exemption incentives, the Government encouraged the establishment of a branch of the Consolidated Cigar Corporation in Cagay, Puerto Rico. This is a modern factory with a rated output of 350,000 cigars per day.

Although the tobacco industry in Puerto Rico has improved in many respects there is still a great need for better curing barns and improved credit facilities for the producers.

Puerto Rican cigar tobacco is most desirable and undoubtedly competitive quality-wise on the world market, though it is not well known nor have its outstanding qualities been made known to cigar manufacturers. A number of factors are responsible for this situation. Associations and dealers are not well informed as to market conditions. Moreover, they have no salesmen. The number of buyers is limited, an important factor in determination of price and, finally, sales promotion work is almost non-existent. It is understood that cigar manufacturers who use large quantities of Puerto Rican tobacco in their leading brands do not mention that fact on the cigar box or in their advertising, as for example does Cuba.



A plot of cigar filler tobacco, type 46, in Puerto Rico.



A tobacco-grading room in Puerto Rico. Women are traditionally employed for the work done here.



Puerto Rican women strip tobacco after the first fermentation. Two-thirds of the stem is removed, and the leaf is then graded and fermented again.



Workers in Puerto Rico bulk tobacco hands for fermentation in the warehouse.

Ninety-five percent of the cigar filler tobacco is harvested by priming the leaves from the stalk as they ripen. Five percent is stalk-cut. Primed tobacco is strung on twine with a needle, leaving sufficient space between the leaves for drying. Each end of the twine is fastened to a stick, after which it is hung in a barn or drying shed for twenty to forty days depending upon drying conditions. A few of the best growers have ventilated barns and in very humid weather charcoal is used for additional drying heat. However, most growers dry their tobacco in any kind of shed and weather conditions are therefore a big factor in determining quality. Producers are badly in need of adequate curing barns.

When the tobacco has dried it is removed from the stick, rolled into a hand and tied with the end of the string it is strung on. The tobacco is then ready for market and is delivered to Association or "refaccionistas" (dealers) warehouses where it is graded. The Associations' grades conform to the PMA preliminary standard grades for loan purposes. Commodity Credit Corporation loans are made only on graded tobacco certified by a U. S. Grading Service Inspector. There are twenty-two standard grades used in Puerto Rican tobacco which are grouped into six divisions for loan advances. They range from forty-five cents to thirteen cents per pound. The "refaccionistas" grade their tobacco in a similar way with fewer grades and groups of grades. Tobacco is bought by grades, in groups of grades and on crop average.

After the tobacco is graded, it is placed in large round bulks for fermentation. The size of bulks and the length of time it is allowed to remain in bulk depend on the nature of the tobacco and weather conditions. Tobacco is re-bulked from two to six times depending on the amount of heat generated in the bulk, and on the nature of the tobacco. When fermentation is complete, the tobacco is put in bales of 150 pounds covered with burlap. It is at this stage that stripping begins. Two-thirds of the stem or midrib is removed by hand and each leaf is again graded. The stripped tobacco is again fermented, dried and baled.

Approximately 70 percent of a "normal" crop is of grades suitable for stripping. These grades are for long filler cigars. Thirty percent is "boliche" (non strippable) which is used as cutting for short filler cigars.

Tobacco produced in Puerto Rico is of "normal" size. Commercial fertilizer is used by all the growers, and in the past years average yield per acre has increased from 700 to 900 pounds per acre. Very little of the second crop is harvested.

Tobacco is grown principally in eleven districts: Utuado, Orocovis, Ciales, Naranjito, San Lorenzo, Juncos, Barranquitas, Comerio, Caguas, Cayey and Aibonito. Differences in soil, altitude, rainfall and temperature make a difference in the aroma, taste and burn of the tobaccos grown in the various districts. While some of the districts are only separated by a mountain, the tobacco qualities are different.

Tobacco produced in the districts of Utuado, Ciales, Orocovis and Naranjito are strong in aroma and taste. Tobaccos of the Juncos and especially San Lorenzo districts have a white ash. That produced in the Comerio district has the best all-round qualities for making an excellent cigar without need of blending with other tobaccos. Tobacco from this district is very similar to that produced in the Vuelta Abajo district of Cuba. Although the Barranquitas district adjoins the Comerio district, its tobacco is darker in color and coarser in texture. However, burn, taste and aroma are good. The tobaccos produced in Caguas, Cayey and Aibonito districts are splendid in burn and aroma but are a milder type than those in districts mentioned previously.

When blended, type 46 cigar filler produced in the eleven districts is a complete cigar filler of the finest quality. Most of it is bought by leading U. S. cigar manufacturers for blending with Cuban and domestic cigar fillers. The trend for the past eight years has been to increase the amount of Puerto Rican filler in the best blends to obtain a milder and smoother smoking cigar. Puerto Rican cigar filler has a delicate aroma and good taste. It burns well and produces a cool mild and pleasant smoke, and is probably the best all-round cigar filler produced.

Quality-wise, the 1952-53 crop is very good. That year's production of 33,200,000 pounds for cigar filler exceeded the quota of 30,000,000 pounds for cigar filler. Production of chewing tobacco in 1952-53 met the quota of 1.2 million pounds. Demand was good and the entire crop has been sold.

Yield per acre in 1952-53 was approximately 5 to 8 percent above "normal" due to favorable growing conditions. (Rains in January and clear weather in February and March determine to a great extent the size and quality of tobacco grown in the tropical islands.) The color was excellent, varying from a light brown in the Caguas district to a deep mahogany in the Utuado district. The burn and aroma of tobacco from all districts were good. Heavier tobaccos from the Utuado, Ciales, Orocovis and Juncos districts showed a tendency to bruise during fermentation, yielding a larger percentage of "manchado" (stained or spotted) tobacco than expected. With this exception the 1952-53 crop is one of the best in many years from the standpoint of average return to the producers and general use by the manufacturers.

Compared to 1951-52, the 1952-53 marketing situation was unusual. The associations received 100 percent of parity for graded leaf tobacco from the 1951-52 crop, giving them an average \$34.33 per 100 lbs. In 1952-53 they received 92 percent of parity for the graded leaf giving an average \$35.35 per hundred lbs. Association members actually averaged \$1.02 per 100 lbs. more in 1952-53 at 92 percent of parity than they received in 1951-52 at 100 percent of parity. This was due to better quality tobacco that graded 3% higher. The yield per acre was also higher in 1952-53 than it was in 1951-52. The "refaccionistas" (dealers) paid producers an estimated average of \$28.50 per 100 lbs. in 1951-52 and an estimated average of \$30.50 per 100 lbs. in 1952-53. The top grades of strip sold

for \$1.10 per lb. in both years. Non-strippable tobacco sold for \$28 per 100 lbs. in 1951-52 and \$31 per 100 lbs. in 1952-53. The extra 6-1/2 percent paid by dealers to producers for the 1952-53 crop was practically covered by the increase in strip yield of top grades plus the \$3.00 per hundred lbs. increase in the price of non-strippable tobacco. Establishment of a Production and Marketing Board, made up of representatives of growers, associations, "refaccionistas" and buyers, with the Secretary of Agriculture as its chairman, is now under consideration. Such a board would have the responsibility of formulating policies and developing means of securing better information and cooperation in regard to the production and marketing of Puerto Rican tobacco.

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FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT-32-53

SHRINKING U. S. TOBACCO EXPORTS TO WESTERN GERMANY ^{1/}

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CURRENT SERIAL RECORD

★ FEB 10 1954 ★

Since 1948 Western Germany has been the second largest ~~importer~~ ^{OF AGRICULTURE} of American tobacco. It now consumed between two and three percent of the entire U. S. tobacco crop, and buys an average of 10% of all the tobacco exported by the United States. However, since 1950 a steady decline in the U. S. share of total German tobacco imports has been noted. West German tobacco imports have risen from 99 million pounds in 1950 to about 112 million pounds in 1953 (estimated), or an increase of about 13%. At the same time the share of U. S. leaf in West Germany's tobacco imports went down from 51% in 1950 to 43% during the first nine months of 1953. Simultaneously, the importation of Oriental tobacco from Greece and Turkey rose from 21% in 1950 to 28% in 1953. There has been a sharp increase in importation of flue-cured leaf from Southern Rhodesia, Japan, India and other countries.

It is reported from Germany that recently consumer tastes have changed or reverted somewhat toward prewar patterns. This is said to be largely responsible for the increased importation and use of Oriental tobacco, but many German importers and manufacturers are of the opinion that the increasing price of American tobacco is chiefly responsible for this shift. There are indications that this trend may continue if U. S. tobacco prices and values of U. S. imports from Germany remain on their present levels. The foreign exchange problems of Germany are likely to continue to be such that German importers will be under pressure to purchase from the countries to whom they can export manufactured products.

Before World War II, about 97% of all cigarettes smoked in Germany were of the Oriental type. In those years Greece and Turkey supplied more than one-third of all tobacco imported by Germany. Other substantial suppliers during those years were Indonesia - 25%, Brazil - 13%, Bulgaria - 13% and U. S. 6% (percentages based on 1936 imports). Much of the tobacco from Brazil and Indonesia was cigar types. Much of tobacco from Brazil

Since 1950 when Greece and Turkey were regaining importance as suppliers of leaf to Western Germany, the U. S. share of West German tobacco imports shrank as indicated above. Imports of flue-cured leaf from countries other than the U. S. rose from 0.2 % in 1950 to 5% in 1953. Trade sources report that recently significant quantities of Chinese flue-cured tobacco has been supplied to manufacturers in West Germany

^{1/} Based largely on a consulate report from Western Germany

Analysis of the Drop in U. S. Share of West German Tobacco Imports

An analysis of the drop in U. S. share of West German tobacco imports, indicates that there is a wide variety of contributing factors. While the proportion of West German cigarette smokers who prefer lighter and milder cigarettes is much higher than prewar the West German manufacturers have apparently solved the problem of producing cigarettes which are similar to American-blend types by adding a higher percent of Oriental than is customarily used in American-blends. It has been reported that the overall content of Oriental tobacco in American-blend cigarettes produced in Western Germany has risen from 30 percent to 40 percent during the past few years. At the same time the share of U. S. tobacco in these cigarettes dropped from 60 % in 1950 to 50% in 1953. Also, the consumption of straight Oriental cigarettes has risen from only two percent of the total used in 1952 to almost 13 percent in the fall of 1953. The success may partly be attributed to the fact that these cigarettes are being marketed under brands that were popular in Germany before the war.

West German importers of American tobacco do not deny that there may be a significant change in consumer taste, but they are of the opinion that the shift away from American tobacco to Oriental leaf has been greatly influenced by the high price of American tobacco.

German manufacturers could not be expected to express much, if any, opposition toward the swing to less expensive Oriental tobacco since they say they are in difficult financial straits in view of relatively inflexible retail prices of cigarettes on the one hand and rising costs of leaf tobacco on the other. Importers have pointed out that, on an average, prices for American tobacco since 1950 have gone up almost 50 percent with 1953 prices about 4 or 5 percent above the 1952 level. However, at least part of the increase in price paid in recent years is due to purchase of better quality by West Germany. Prices paid by Western Germany for Oriental tobacco imported from Greece and Turkey increased about 18% from 1950 till 1953, and in December 1953 were about 16% lower than prices paid for U. S. tobacco. These are calculated on the basis of actual imports by Western Germany, as shown in the table below.

German tobacco importers state that as a result of the short 1953 U. S. flue-cured crop, they have purchased grades which they normally would not have imported. They further indicated that they believe the U. S. crop was overgraded in an effort to secure higher average prices.

Numerous representatives of the tobacco trade in West Germany have indicated that they think that large quantities of flue-cured tobacco are now being imported from Southern Rhodesia, India, Japan and other countries primarily because of the differences in prices paid for these tobaccos as compared to the prices paid for U. S. leaf.

Although the quality of these tobaccos is not comparable to U. S. flue-cured, West German manufacturers are now processing substantial quantities of such leaf mainly because prices are lower. It is reported

that the average price paid by Western Germany for flue-cured tobaccos purchased from countries other than the U.S. in 1953 was approximately \$0.433 per pound declared weight. This is only about 70% of the average price that West German importers paid for U. S. tobacco in 1953. These are based on actual West German imports in the period January-October 1953.

In the latter part of 1952 and in 1953 Western German manufacturers received substantial quantities of flue-cured tobacco from China. In December 1953 there were additional large quantities (estimated at about 4.8 million pounds) of Chinese flue-cured leaf in German and Netherlands ports. Part of this tobacco has or will be sold in Western Germany and other Western European countries. Tobacco importers who have traditionally imported American tobacco, said that they would prefer to continue to do business with the United States in view of the quality of leaf obtained and the reliability of the business practices followed by American tobacco shippers. They pointed out that in view of recent increasing West German demand for flue-cured leaf, numerous countries which have been growing American-seed flue-cured tobacco have been and are further encouraged to expand production. Expanding future production in these countries will not only compete more effectively quantitatively with U. S. tobacco, but the German manufacturer and consumer will become more-and-more accustomed to this type of tobacco and may continue to use it even if U. S. tobacco prices should decrease in relation to prices of tobacco from other sources. American tobacco will have to meet stiffer and more permanent competition in the future.

Prospects

In general West German tobacco importers and manufacturers believe that the future use of U. S. tobacco in Western Germany will to a large extent depend on price developments. At present Western Germany is importing tobacco at the rate of about 110 million pounds per year. The tobacco tax reduction in June 1953 in addition to other factors is expected to increase overall consumption of tobacco products about 25 to 30 percent. However, they may purchase most of the additional flue-cured leaf elsewhere especially if the spread between prices of U. S. leaf as compared to that from other sources does not narrow in the future.

Many West German importers and manufacturers believe that there will always be a market for American tobacco in Western Germany to fill the minimum demands for American-blend cigarettes. However, in the past few years the proportion of U. S. leaf in these blends has been reduced to the present level of 50%, and it is generally believed that this percentage cannot be reduced further without losing the distinctive characteristics of American-blend cigarettes. Whether or not the American-blend cigarette will remain the most popular cigarette in Western Germany (85% of all cigarettes are now American blends) is an open question. It will largely depend on the popularity of straight Oriental brands. The sale of straight Orientals has increased during the past year from 2 to 13 percent of total cigarette consumption. The bulk of the straight Oriental cigarettes, however, are presently selling in the 10 Pfennigs (equivalent to \$.48 per pack of 20) bracket. No substantial inroads

have been made by straight Oriental cigarettes in the 8-1/3 Pfennigs (equivalent to \$.33 per pack of 20) bracket, in which about 80% of all cigarettes in Germany are now selling. So far, no serious attempts have been made to market new brands of straight Oriental cigarettes in an effort to secure an even larger portion of the West German cigarette market. It is reported that some West German manufacturers are considering reintroducing a few of their straight Oriental brands which were popular in Germany before the war. Utilizing their prewar goodwill as a basis to start from, some companies may try to reintroduce brands in the 8-1/3 Pfennigs bracket. One reason why West German companies may not yet have attempted to market straight Oriental cigarettes in the lower price brackets may be due to the fact that at present prices of top grades of Oriental tobacco needed to make good straight Oriental cigarettes are too high for profitable production at such prices. There are indications, however, that the price of Greek tobacco may decline somewhat from recent levels. At this date marketing experts are extremely reluctant to predict the results of such an experiment, but they concede that if this materializes that it might be sufficient to warrant production of a lower priced straight Oriental cigarette in competition with other types in the largest cigarette consumption bracket. Such efforts would be enhanced by the fact that this type of cigarette was the most popular in Germany before the war. One thing seems certain, if one company is moderately successful in selling straight Oriental cigarettes in the lower price class, other manufacturers will hastily follow with more straight Oriental brands. This would change substantially the pattern of Western Germany's tobacco imports.

West German Imports of Manufactured Tobacco

Years	U. S. Tobacco					Oriental Leaf from Turkey & Greece				
	Total	1,000	% of Total	Average	% Increase	1,000	% of Total	Average	% Increase	
	Imports	lbs.	Tobacco	Price	over 1950	lbs.	Tobacco	Price	over 1950	
	1,000		Leaf	per lb.			Leaf	per lb.		
	lbs.		Imports	1/			Imports	1/		
1950	99,004	50,906	51	.419		20,719	21	\$.451		
1951	101,919	52,293	51	.520	24.2	23,891	24	\$.495	11.9	
1952	113,411	53,056	47	.598	42.8	27,970	26	\$.524	16.0	
1953										
Jan-Sep.	86,156	37,128	43	.618	48.0	24,292	28	\$.535	18.4	

1/ Converted to U. S. currency on the basis of one Deutch mark equal to 23.8 U. S. cents

Summary of Article Published in "Die Tabak-Zeitung"
No. 46, dated November 13, 1953, entitled
"Greek Tobacco Getting Scarce."

- 1.) The article reports that the Greek 1953 tobacco crop was about 134,500,000 lbs. and equals the average crops of 1936 through 1940. (Latest reports received by FAS indicate a production of 137,891,000 pounds for 1953.) The 1951 crop stood at a record level of 139,900,000 pounds, but the 1952 crop was unusually low at 88 million pounds. Of the 1953 crop about 80% (101 million pounds) was available for export. This is calculated by deducting 10% of the crop for domestic consumption and 10% as being of non-exportable quality. It is believed that this quantity was not adequate to cover export demand in view of rising exports to the Federal Republic and Eastern European countries, including the Soviet Zone.
- 2.) Various sources continue to report that the Greek Government plans expansion of tobacco cultivation in their country up to 220 million pounds per year. If such a crop were produced, about 143,000,000 pounds would be available for export as compared with prewar exports of about 110 million pounds.
- 3.) The increase of the 1953 crop was mainly attributed to good weather conditions during the growing season. Rising exports and the fixation of good growers' prices by the Government resulted in good returns to growers. The Greek Government has now developed a policy of limiting tobacco cultivation to 4 - 5 types producing the highest quality leaf. A strict prohibition will be imposed on the exportation of low-grade tobacco.
- 4.) The article states further that the Greek Government is following a policy of stabilizing tobacco prices. The 1953 crop prices were to have been fixed in December with the prices established to remain valid for the next three to four years. It was reported that the prices that were to be fixed at a level lower than that of 1952 in view of the devaluation of the Greek currency (Drachme).
- 5.) Greek exports to Germany are still well below the prewar level of 48.5 million pounds, (presently 17.6 million pounds per year). It is reported that many Greeks believe that better grades and lower prices will win back German smokers to Oriental cigarettes.

Summary of Another Article Appearing in the November 13, 1953 German
Trade Journal, "Die Tabak-Zeitung."

The dollar position of Western Germany has been improved considerably of late and it has been reported by a prominent tobacco trade representative that the present dollar allocations made by the German Federal Government to the tobacco industry have not been fully utilized. It has been rumored that the expected liberalization list of certain dollar imports into Western Germany in the beginning of the next year (1954) will include tobacco.

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